

USER GUIDE

REGISTRATION RETURNS – NEW AND REACTIVATIONS

May 27, 2025

BC Lobbyists Registry User Guide Registration Returns – New and Reactivations

INTRODUCTION	2
OVERVIEW OF REPORTING OBLIGATIONS	3
Registration Return – Submit New or Reactivate	3
Monthly Returns – Registration Return Updates and Lobbying Activity Reports	3
Funding Returns – Received Government Funding	1
ACCOUNTS	1
Designated Filer Account	1
Representative Account	5
Senior Officer Change	5
DASHBOARD LINKS AND ACTIONS	5
CREATE A NEW REGISTRATION RETURN	7
Starting a New Registration Return	7
Navigating the New Registration Return	9
Registration Summary Page	9
Yellow Banners)
Green Banners)
Changing an Answer from Yes to No 13	1
Certifying and Submitting the Registration Return	1
RE-ACTIVATE A REGISTRATION RETURN	3
CORRECTIONS REQUIRED TO REGISTRATION RETURN15	5
DELETE A REGISTRATION RETURN VERSION – NEW / REACTIVATION AND UPDATES 16	5
END A REGISTRATION RETURN	7
Immediately End a Registration Return if Lobbying has Ceased	7
Set a Future Date to End a Registration Return On	9
VIEW VERSIONS OF A REGISTRATION RETURN21	L
Locate Registration Return	1
View Versions (Active and Previous)22	1
ADDITIONAL FUNCTIONS22	2
Print your Registration Return	2

	Share your Registration Return	22
G	ETTING HELP	24
	ORL Resources	
	Full Length User Guides	24
	Legislation	24
	Contacting Registry Staff	24

Notice

This document is for information purposes only and does not constitute a decision or finding by the Registrar of Lobbyists for British Columbia or their delegates. This guidance does not affect the powers, duties or functions of the Registrar of Lobbyists, or their delegates, regarding any investigation or other matter under the Lobbyists Transparency Act, respecting which the Registrar and their delegates will keep an open mind. Responsibility for compliance with the Lobbyists Transparency Act remains with each lobbyist.

INTRODUCTION

The <u>Lobbyists Transparency Act</u> ("LTA") came into force on May 4, 2020. The LTA and the <u>Lobbyists Transparency Regulation</u> set out registration requirements for individuals and organizations engaged in lobbying activities.

For a brief overview of the provisions of the current legislation and regulation governing lobbying in BC, together with an explanation of the most commonly-used features of the Lobbyists Registry, see the <u>GETTING STARTED - REFERENCE GUIDE</u>. It is designed to answer common questions.

In the pages that follow, you will find guidance on how to create and submit a new Registration Return and how to reactivate an inactive (previously ended) Registration Return. This user guide also provides instructions on how to <u>end</u> a Registration Return if lobbying has ceased.

OVERVIEW OF REPORTING OBLIGATIONS

Registration Return – Submit New or Reactivate

If a consultant lobbyist or organization¹ with one or more in-house lobbyists begins or resumes lobbying, the Designated Filer² is required to submit a **New Registration Return** or to **Reactivate** their previous (inactive) Registration Return within <u>10 calendar days</u> of starting or resuming lobbying, unless any of the exclusions set out in the LTA apply.

For guidance on the exclusions, see the section titled "**Do any of the exclusions apply?"** in the <u>GETTING STARTED - REFERENCE GUIDE</u>.

Monthly Returns – Registration Return Updates and Lobbying Activity Reports

Designated Filers with an active Registration Return have the following Monthly Return reporting obligations:

- File a Registration Return Update by the 15th of the following month **IF** there has been a change to the information declared in the Registration Return; and/or
- File Lobbying Activity Reports by the 15th of the following month **IF** lobbying of a "senior public office holder" occurred.

See user guide <u>Monthly Returns - Registration Return Updates and Lobbying Activity Reports</u> for further guidance on Monthly Returns.

Organizations may be incorporated, unincorporated, a sole proprietorship or a partnership.

(a) a consultant lobbyist, or

(b) in the case of an organization that has an in-house lobbyist,

(i) the most senior officer of the organization who receives payment for performing the officer's functions, or

(ii) if there is no senior officer who receives payment, the most senior in-house lobbyist;

¹ The term "organization" is defined in the LTA to include:

[•] a business, trade, industry, professional or voluntary organization;

a trade union or labour organization;

[•] a chamber of commerce or board of trade;

[•] a charitable or non-profit organization, association, society, coalition or interest group;

[•] a government, other than the government of British Columbia; and

[•] an individual other than a person on whose behalf a consultant lobbyist is lobbying.

² The LTA defines **Designated Filer** as:

Funding Returns – Received Government Funding

Designated Filers with an active Registration Return must submit a **Funding Return** if their organization or client receives funding from any Canadian or foreign government, including from any municipal, provincial, territorial, regional, or state government. This is in addition to funding received from any government agency or Provincial entity.

The deadline to submit a Funding Return is no later than 3 months and 15 days following the month in which the government funding was received.

See user guide Funding Returns for further guidance on Funding Returns.

ACCOUNTS

There are two types of accounts in the Lobbyists Registry:

- Designated Filer; and
- Representative.

In-house lobbyists do <u>not</u> have their own accounts, unless they are also the Designated Filer for their organization or act as a Representative.

An individual will only ever have one account in the Lobbyists Registry. Registry staff may revise the type of account someone has, if necessary, to allow them to carry out more than one role.

For more information on creating accounts, see User Guide - Account Management.

If you had an account in the previous Lobbyists Registry, **DO NOT CREATE A NEW ACCOUNT**. See User Guide - Accounts and Registrations from the Previous Registry.

If you have an account in the current Lobbyists Registry but are unable to sign in to your account, **DO NOT CREATE A NEW ACCOUNT**. See **FORGOTTEN PASSWORD OR USERNAME** section in <u>User Guide – Account Management</u> for the steps to get access to your account.

Designated Filer Account

Designated Filers must create and activate their own Designated Filer account.

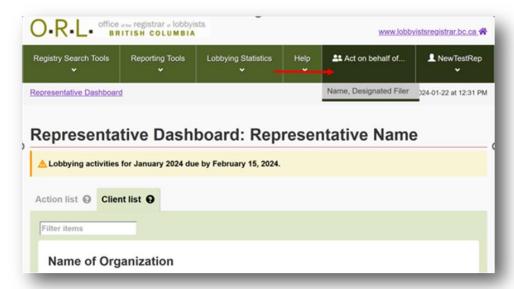
The Designated Filer signs in to the Lobbyists Registry with their account to create or reactivate the Registration Return and to submit Funding Returns and Monthly Returns (Registration Return Updates and/or Lobbying Activity Reports, as necessary).

Representative Account

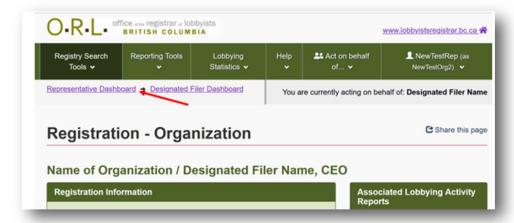
Representatives provide administrative services for Designated Filers. Representatives can enter and update information in Registration Returns, Funding Returns and Lobbying Activity Reports, but they cannot submit them to the Registry with their own username and password. The Designated Filer's username and password must be used.

For more information on creating and authorizing a Representative account, see <u>User Guide</u> - Account Management and Quick Reference Guide for Representatives.

Once the Designated Filer has authorized a Representative, the Representative can access the Designated Filer's dashboard from within their Representative account. This is accessed by clicking "Act on behalf of..." at the top right of the menu bar of the Representative's Dashboard and then clicking the Designated Filer's name.



To return to the Representative Dashboard, click "Representative Dashboard".



Senior Officer Change

If an organization has an active Registration Return and the person currently registered as the Designated Filer no longer meets the LTA's definition of "designated filer", the organization's Registration Returns, Lobbying Activity Reports and Funding Returns must be transferred and attached to the account of the new Designated Filer by the 15th of the month following the month in which this change occurred. See the section titled "**Register a New Senior Officer for an Organization**" in the <u>Account Management</u> user guide.

DASHBOARD LINKS AND ACTIONS

Under the "Current Registrations" tab on the Designated Filer's Dashboard, you will see one or more of the links shown in the table below beside **Pending Registration Return** or **Active Registration Return**.

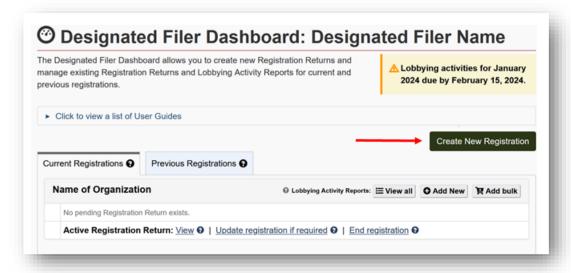
LINK	FUNCTION
View 6	Click to see the active Registration Return
Update registration if required 9	Click to update the active Registration Return. This creates a pending Registration Return which you can edit and submit for activation.
Incomplete	You started a new Registration Return or an update to an existing Registration Return or started to reactivate an inactive Registration Return. Information is still required. Click to review/edit & submit the Registration Return to the Registry for activation.
Requires certification	You started a new Registration Return or an update to a Registration Return or started to reactivate an inactive Registration Return. Click to review/edit & submit the Registration Return to the Registry for
	activation.
Delete 9	Click to delete a pending new, update or reactivation of a Registration Return that has not been activated by Registry staff. Note: If there is an existing active registration, it will not be affected.
Correction required ②	You submitted a new Registration Return or an update to a Registration Return or a reactivated Registration Return. Registry staff sent it back to you for correction. You may receive an email with details. Click to see notes from staff & enter corrections.
Submitted 9	You submitted a new Registration Return or an update to an existing Registration Return or a reactivated Registration Return to the Registry. Click to view the submitted Registration Return.
End registration 😌	Click to deactivate an active registration if lobbying activity has stopped. Note: you must reactivate a Registration Return within 10 calendar days of resuming lobbying activity.

CREATE A NEW REGISTRATION RETURN

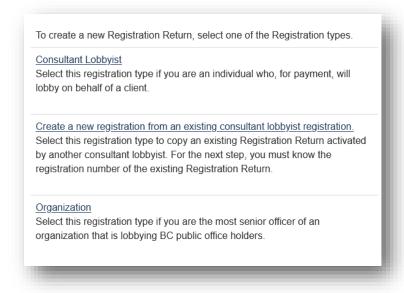
Starting a New Registration Return

Do **not** interact with Registry buttons by right-clicking and opening in separate tabs or windows. Doing so may cause errors or result in the loss of new or changed information entered in these separate tabs/windows. Rather, left-click on buttons and let the Registry navigate to the relevant page.

- 1. Go to the Lobbyists Registry sign in page and sign in to your account.
- 2. From the Designated Filer Dashboard, click the "Create New Registration" button.



3. Select the type of Registration Return being created.



- 4. Select the "Start Date" for the New Registration Return. The "Start Date" is the date on which the first lobbying activity occurred.
 - For an organization the "Start Date" is the date lobbying first occurred by any of the organization's in-house lobbyists.
 - For a consultant lobbyist the "Start Date" is the date the consultant lobbyist first lobbied on behalf of the client.
- 5. The Registry will then take the Designated Filer through the process of entering the information required under the LTA.

The Registry sorts this information into seven separate categories, referred to as "Steps":

For <u>organizations</u>, the "Steps" are as follows:

- Step 1 of 7: Designated Filer and Organization Information
- Step 2 of 7: Other Entities Working Together for the Purpose of Lobbying
- Step 3 of 7: Affiliates and Contributors with a Direct Interest
- Step 4 of 7: In-House Lobbyists (Organization Registration Returns only)
- Step 5 of 7: Government Funding Information
- Step 6 of 7: Subject Matter of the Lobbying Activities
- Step 7 of 7: Public Agencies and Members of the BC Legislative Assembly Information

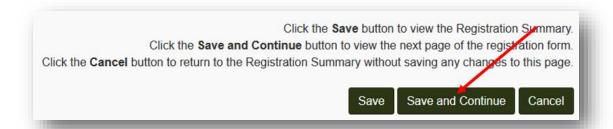
For consultant lobbyists, the "Steps" are as follows:

- Step 1 of 7: Consultant Lobbyist information
- Step 2 of 7: Client Information
- Step 3 of 7: Other Entities Working Together for the Purpose of Lobbying
- Step 4 of 7: Affiliates and Contributors with a Direct Interest
- Step 5 of 7: Government Funding Information
- Step 6 of 7: Subject Matter of the Lobbying Activities
- Step 7 of 7: Public Agencies and Members of the BC Legislative Assembly Information

Navigating the New Registration Return

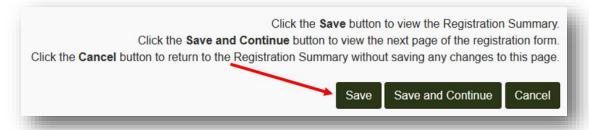
After entering the "Start Date", the Registry will automatically take the Designated Filer to Step 1 of 7.

Designated Filers can enter information in sequential order (from Step 1 through 7) by providing all of the information required in each "Step" and then clicking "Save and Continue".



Clicking "Save and Continue" will take the Designated Filer to the next "Step". This is the recommended process for completing a New Registration Return, especially if it is the Designated Filer's first time.

Alternatively, if the Designated Filer would prefer to enter information without the Registry automatically taking them to the next "Step", the Designated Filer can click "Save", which will save the information entered in the current "Step" and bring the Designated Filer to the Registration Summary page, where all of the "Steps" are shown and all of the information entered so far can be reviewed.



Registration Summary Page

The main page of the Registration Return is referred to as the **Registration Summary** page.

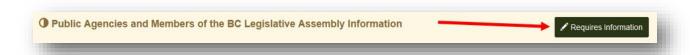
From the Registration Summary Page, Designated Filers can review all the information entered so far.

The banners for each of the "Steps" will be either yellow or green.

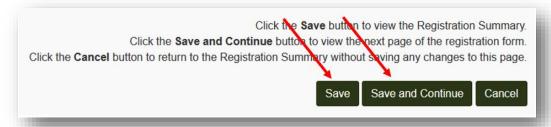
Yellow Banners

A yellow banner with a symbol is shown when the Designated Filer has not yet entered all the required information into that "Step".

Designated Filers should click the "Requires Information" button in the banner and enter any required information for that "Step" in the page that follows.



Once all the required information has been entered for that "Step", click "Save" to return to the Summary page, or "Save and Continue" to proceed to the next "Step".



Green Banners

A green banner with a symbol is shown when all the fields that require information in that "Step" have been filled in.

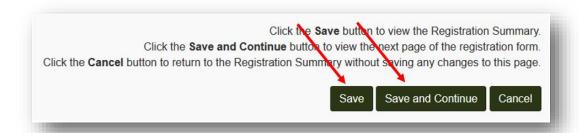
A green banner does <u>not</u> indicate that the information is accurate or complete, but rather serves as a visual indicator that the required fields have information entered into them.

Designated Filers should carefully review all the information in the Registration Return, even if the banner is green, to ensure the information is accurate and complete.

If any of the information in a "Step" requires corrections or additions, click the "Edit" button in the banner.



Make the necessary corrections or additions, then click "Save" to return to the Summary page, or "Save and Continue" to proceed to the next "Step".



Changing an Answer from Yes to No

The following "Steps" have Yes/No questions to which, if "yes" is selected, additional details are required:

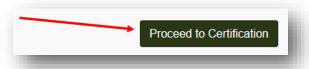
- Step 2: Other Entities Working Together for the Purpose of Lobbying
- Step 3: Affiliates with a direct interest in the outcome
- Step 3: Others with a direct interest in the outcome
- Step 3: Contributors with a direct interest in the outcome
- Step 4: Former public office holder positions in BC
- Step 4: Relevant codes of conduct
- Step 5: Government funding

If you previously declared "yes" to questions within these "Steps" and entered the details, you will not be able to change your answer to "no" until you remove the details. Delete the details, then change your answer to "no".

Certifying and Submitting the Registration Return

When all the "Steps" have green banners, the "Proceed to Certification" button will appear at the bottom of the Summary page.

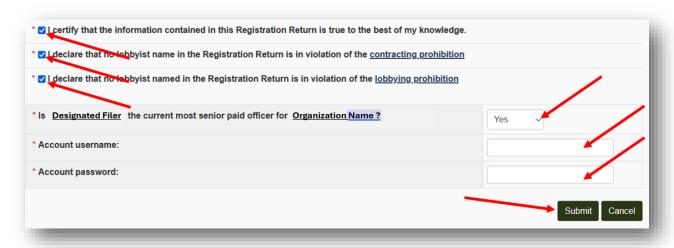
After ensuring all the information displayed on the Summary page is complete and accurate, click the "**Proceed to Certification**" button to begin the process of certifying and submitting the New Registration Return.



The "Certification of Registration Return" page that follows is slightly different for organizations and consultant lobbyists.

For **organizations**:

- Read the three statements and confirm compliance by ticking the check boxes.
- 2. Select "**Yes**" to the question "Is (<u>Designated Filer</u>) the current most senior paid officer for (<u>Organization Name</u>)?
- 3. Enter the Designated Filer's username and password.
- 4. Click "Submit".



For **consultant lobbyists**:

- 1. Read the three statements and confirm compliance by ticking the check boxes.
- 2. Enter the Designated Filer's username and password.
- Click "Submit".



Note for Representatives

A Representative preparing a Registration Return on behalf of the Designated Filer will **not** be able to submit the Registration Return with their own username and password.

The Registration Return can only be submitted after entering the **Designated Filer**'s username and password.

The Confirmation of Filing screen confirms that the Registration Return has been **successfully submitted**. The Registry will also send a **confirmation email**.

NOTE: The **Registration Return** is now locked and cannot be updated until Registry staff have activated it or sent it back for corrections/updates.

See the section titled "Corrections Required to Registration Return" below for step-by-step guidance on making corrections to a Registration Return that has been sent back.

RE-ACTIVATE A REGISTRATION RETURN

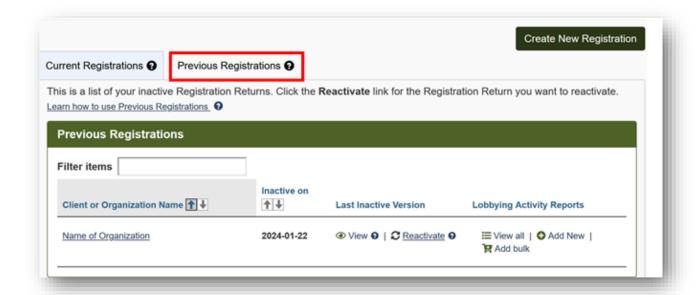
An active Registration Return can become **deactivated** by:

- the Designated Filer intentionally **ending** the Registration Return (see the section titled "End a Registration Return" below).
- the Designated Filer not filing an update to the Registration Return or a Lobbying Activity Report for 6 months.

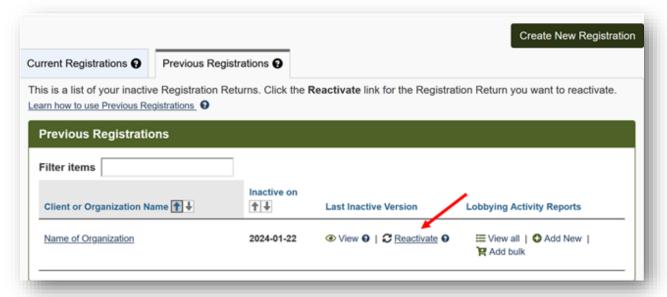
Designated Filers are required to keep their Registration Return active if lobbying continues to occur.

Designated Filers are required to **Re-activate** their Registration Return if lobbying activities have resumed after their previous Registration Return was deactivated. Designated Filers must re-activate the Registration Return within **10 calendar days** of lobbying activity resuming.

- 1. Go to the Lobbyists Registry sign in page and sign in to your account.
- 2. On the Designated Filer Dashboard, click on the "Previous Registrations" tab.



3. Locate the Registration Return you need to re-activate and click "Reactivate".



4. Review the details of the Registration Return and make updates by clicking on "Edit" in the banner of the relevant sections (referred to as "Steps").

If your Registration Return has been inactive for over 12 months, you will need to re-enter much of your information.

"Steps" where you need to re-enter the data will be indicated as incomplete . Click on the "Edit" link to enter the information required.



5. Once all updates are complete, submit the changes by clicking "Proceed to Certification".



6. Confirm compliance by ticking the check boxes.

Check the **Date when the lobbying activities restarted**.

Enter the Designated Filer's username and password and click "Submit".

If you are a Representative preparing this reactivation on behalf of the Designated Filer, you will not be able to submit it with your own username and password. The reactivated Registration Return can only be submitted after entering the Designated Filer's username and password.

CORRECTIONS REQUIRED TO REGISTRATION RETURN

If a Registration Return was sent back for corrections, Registry staff entered notes in one or more sections of the Registration Return. You may receive more details in an email from a Registry officer.

1. On the Designated Filer Dashboard, under the Current Registrations tab, click the "Correction required" or "Corrections overdue" link.



2. Scroll through the Registration Return. The sections where corrections are required will be indicated with a red symbol. There will also be a note included from Registry staff. Refer to the note or email from Registry staff for details of actions required.



3. Click the "Edit" button to be taken to the screen to make the necessary corrections.



Use the pencil icon to edit and the trash icon to delete information.



- 4. Once the corrections are complete, click on "Save" or "Save and Continue" at the bottom of the screen.
- 5. Once all required changes have been made, certify and submit your changes by following the same process as when initially submitting the Registration Return.

DELETE A REGISTRATION RETURN VERSION – NEW / REACTIVATION AND UPDATES

You can delete any version of a Registration Return that has <u>not yet been activated</u>. This includes:

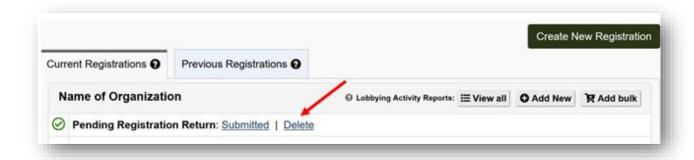
New Registration Returns

- Registration Return Reactivations
- Registration Return Updates

However, you <u>cannot</u> delete a version of your Registration Return that has been activated.

If you discover an error in an activated version of your Registration Return, contact Registry staff at info@bcorl.ca.

1. To delete a not-yet-activated version of your Registration Return, locate the Registration Return under the **Current Registrations** tab of your Designated Filer Dashboard. Beside **Pending Registration Return** click "**Delete**".



2. Read the note on the next screen carefully. If you are sure you wish to delete this version of the Registration Return, click "Yes".

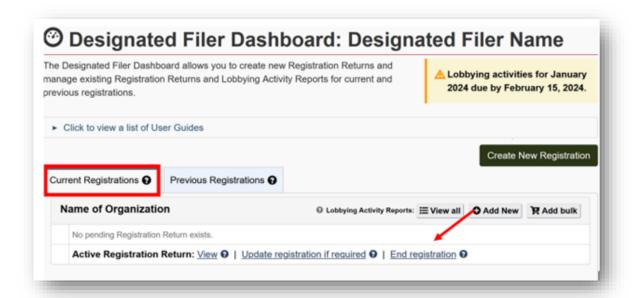
If you delete a Registration Return Update before it is activated, the Designated Filer Dashboard will show the most recent activated version.

END A REGISTRATION RETURN

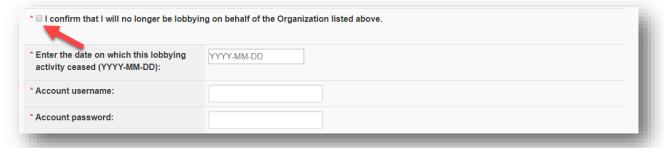
Immediately End a Registration Return if Lobbying has Ceased

If lobbying activities have come to an end, the Designated Filer will need to $\underline{\bf End}$ (deactivate) their Registration Return.

- 1. Go to the Lobbyists Registry sign in page and sign in to your account.
- 2. On the Designated Filer Dashboard, make sure you are working under the "Current Registrations" tab. Find the Registration Return and click "End registration".

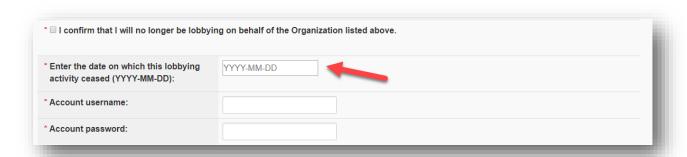


3. Confirm that lobbying activity has ended by checking the **tick box**.



4. Enter the date on which the lobbying activity ceased.

You may only enter today's date and previous dates. If lobbying has not yet ceased, wait until lobbying has ceased before manually deactivating your Registration Return. **Alternative**: to enter a date in the future you must follow the instructions set out below in the section **Set a Future Date to End a Registration Return On**.



5. Enter the Designated Filer's username and password and click "Submit".

If you are a Representative preparing this update on behalf of the Designated Filer, you will not be able to submit it with your own username and password. The updated Registration Return can only be submitted after entering the Designated Filer's username and password.

6. The Confirmation of Filing screen that follows confirms that you have successfully ended your Registration Return.

You can now either Sign out or click on "Return to Designated Filer Dashboard".

Set a Future Date to End a Registration Return On

Designated Filers who are certain all lobbying will cease by a specific date can have the Registry automatically end their Registration Return on that date. This is done by submitting a Registration Return Update and selecting an end-date for the lobbying activity.

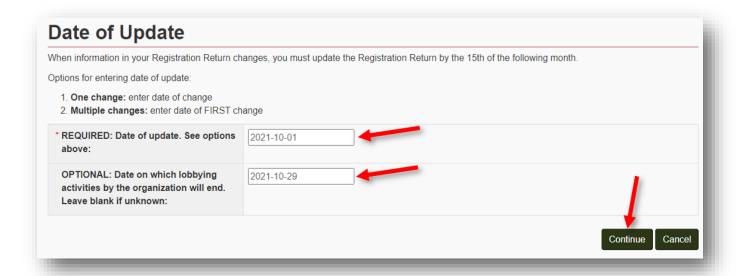
1. Go to the Lobbyists Registry sign in page and sign in to your account.

On the Designated Filer Dashboard, make sure you are working under the "Current Registrations" tab.

- 2. Locate the Registration Return and click the link located beside **Pending Registration Return** or **Active Registration Return** (For an explanation of links, see <u>Links beside Pending Registration Return/Active Registration Return</u>).
- 3. On the Date of Update screen, enter the **Date when the update took effect**. This is the date on which the **earliest** change/addition to the information in the Registration Return occurred.

If there are no changes other than to select an end date for the Registration Return, select the date on which you knew lobbying activity would be coming to an end.

4. Below that, in the "Optional" field, enter the date when lobbying will end, then click "Continue".



5. Make any other additions/corrections/updates as necessary to the information in the Registration Return, then scroll to the bottom of the Summary screen and click "Proceed to Certification".



- 6. Confirm compliance by **ticking the check boxes** and check that the dates are correct.
- 7. Enter the Designated Filer's username and password and click "Submit".
 - If you are a Representative preparing this update on behalf of the Designated Filer, you will not be able to submit it with your own username and password. The updated Registration Return can only be submitted after entering the Designated Filer's username and password.
- 8. The lobbying end date is now set, and the Registry will automatically deactivate your Registration Return on that date.

VIEW VERSIONS OF A REGISTRATION RETURN

A new public version of a Registration Return is created each time you submit updates to the Registration Return and those updates are activated by Registry staff.

The updated version of the Registration Return is not visible to the public until Registry staff have activated it.

You may view the currently activate version and any previous version of any Registration Return in the Registry.

Locate Registration Return

To locate any Registration Return <u>without signing in</u>, go to the <u>Lobbyists Registry landing page</u>, select "Registry Search Tools" from the banner and choose "Advanced Registry Search" to perform a search.

To locate your own Registration Return <u>when signed in to your account</u>, select the "Current Registrations" tab from your Designated Filer Dashboard, locate the Active Registration Return and click "View".

View Versions (Active and Previous)

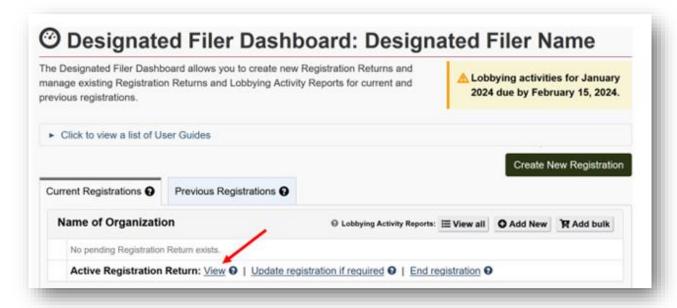
After locating the Registration Return for the organization or client as detailed above, click the **Registration versions** drop-down menu to select a version of the Registration Return. Versions are shown in a "7 of 8" format with the date range for each version beside it.



ADDITIONAL FUNCTIONS

Print your Registration Return

- 1. Go to the Lobbyists Registry sign in page and sign in to your account.
- 2. From the Designated Filer Dashboard, ensure the "Current Registrations" tab is selected.
- 3. Locate the desired Registration Return and click "View" in the row for Active Registration Return.



4. Once the Registration Return is loaded on the screen, use your **browser's print function**. Usually this can be accessed via **File > Print** or by **CTRL+P**.

The Registry will format the Registration Return and print the entire current version in one document.

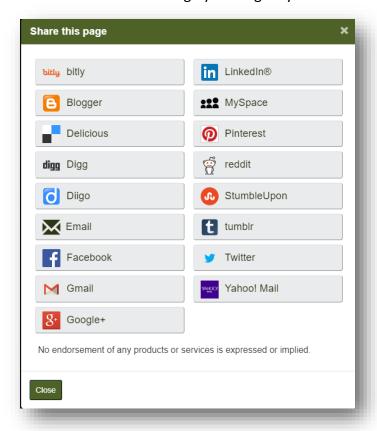
Share your Registration Return

You can share your Registration Return via email or a variety of social media options.

- 1. Locate and open your Registration Return as described above in the printing section.
- 2. Near the upper right of the Registration Return, click "Share this page".



3. Select the method of sharing by clicking on your desired option.



GETTING HELP

ORL Resources

- Getting Started Reference Guide
- Guidance Documents
- FAQs searchable by keyword or phrase
- Infographics

Full Length User Guides

- Monthly Returns and Lobbying Activity Reports
- Funding Returns
- Account Management

Legislation

- Lobbyists Transparency Act (LTA)
- Lobbyists Transparency Regulation
- Miscellaneous Statues Amendment Act, 2024 (Bill 9)

Contacting Registry Staff

If you are unable to complete your Registration Return, send us an email at info@bcorl.ca describing the steps you have taken and the problem you have encountered. Please include any relevant screen captures to help us understand your issue. Also include a phone number we can call if needed.