

**GUIDANCE DOCUMENT** 

BC LOBBYISTS REGISTRY USER GUIDE: MONTHLY
RETURNS – REGISTRATION RETURN UPDATES AND
LOBBYING ACTIVITY REPORTS

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# PURPOSE OF THIS GUIDANCE DOCUMENT

#### **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.

# **Getting Started**

This user guide sets out the Monthly Return requirements for consultant lobbyists and organizations with active registrations in the BC Lobbyists Registry.

Designated Filers are consultant lobbyists and the most senior paid officers of organizations with in-house lobbyists. Designated Filers must file accurate and up-to-date information with the Lobbyists Registry.

Individuals with Representative accounts may be authorized to prepare filings on behalf of a Designated Filer.

If you are a consultant lobbyist who is lobbying on behalf of clients, or the Designated Filer of an organization with in-house lobbyists in BC, you are required to register lobbying activity in the Lobbyists Registry. To register, you must file a Registration Return, and Monthly Returns when the latter are required. For an overview and further details, see <a href="MEFERENCE GUIDE">GETTING STARTED -</a>
REFERENCE GUIDE. The user guides to create a Registration Return are <a href="Consultant Lobbyist">Consultant Lobbyist</a>
Registration Returns and Organization Registration Returns.

Monthly Returns consist of updates to active Registration Returns, and Lobbying Activity Reports. The information in the following pages sets out the steps needed to keep your Registration Return up to date and file Lobbying Activity Reports. Except where noted, these steps are the same for consultant lobbyists and for organizations with in-house lobbyists.

During the time you or your organization are lobbying and you have an active Registration Return, you are required to file Monthly Returns as follows:

- 1. File an update to the Registration Return by the 15<sup>th</sup> of the following month **IF** there has been a change to the information you declared in the Registration Return; and/or
- 2. File one or more Lobbying Activity Reports by the 15<sup>th</sup> of the following month **IF** you or an in-house lobbyist for your organization lobbied a "senior public office holder".

If you or your organization are no longer lobbying, you may de-activate the Registration Return. While there is no lobbying activity and the Registration Return is de-activated, there is no need to file Monthly Returns.

If you or your organization are lobbying, this guide details the process to keep your Registration Return up to date and file Lobbying Activity Reports.

#### Monthly Returns = Updates to Registration Returns and Lobbying Activity Reports

There are two parts to the Monthly Return requirement. Both are due by the 15<sup>th</sup> of the following month:

- Updates to your Registration Return, if required; and
- Lobbying Activity Reports for lobbying activities involving senior public office holders.

File an update to the Registration Return if the information in your Registration Return changes. If the information in your Registration Return does not change in a given month, there is no need to file an update to your Registration Return that month.

File a Lobbying Activity Report if an in-house lobbyist for your organization has lobbied a "senior public office holder". If you have no lobbying activity involving senior public office holders to report for a given month, there is no need to file a Lobbying Activity Report regarding that month.

After 5 months, if you have not filed an update to the Registration Return or a Lobbying Activity Report, the system will send you an automated email asking you to click on the **6-month return** link, update as needed, and submit the updated Registration Return, to indicate that you or your organization are still lobbying. The automated email has instructions to help you end your registration if you or your organization are not lobbying.

#### Tips:

- When you start a new Lobbying Activity Report, you will be required to review the
  information in your Registration Return. If the information is accurate and up to date,
  you must confirm by ticking the check box at the bottom of the screen before you can
  create a Lobbying Activity Report.
- If the information in your Registration Return has changed, enter the updates, certify and submit the updated Registration Return to the Registry, and then create the Lobbying Activity Report.

#### THE DESIGNATED FILER DASHBOARD

#### **Dashboard Menu Functionality**

From the main section of the Designated Filer Dashboard, you can prepare Registration Returns, updates and Lobbying Activity Reports.

The Designated Filer's name will appear in the menu bar located at the top right of the screen. Clicking the Designated Filer's name allows you to:

- Update your Account Profile
- Update Consultant Lobbyist firm profiles (Consultant Lobbyists only)
- Sign out of the Lobbyists Registry

Return to the main dashboard from profile screens by clicking "Dashboard".

# **Current, Previous, and New Registrations**

The main section of the Designated Filer Dashboard allows you to:

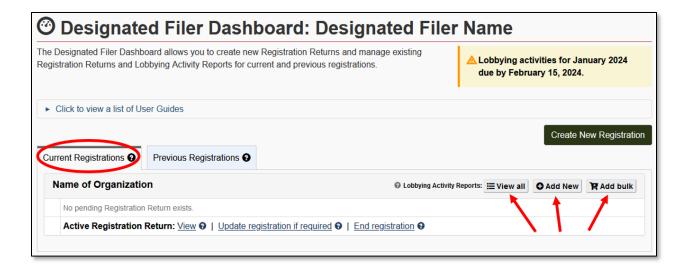
- Create a new Registration Return
- View and update current Registration Returns
- View and reactivate previous (inactive) Registration Returns
- Create new Lobbying Activity Reports
- View previous Lobbying Activity Reports

#### **View Current Registration Returns**

View current Registration Returns under the "Current Registrations" tab. When you click "View" beside 'Active Registration Return", you will see the currently active Registration Return. (If you click "View" you will not see any changes you have started but not submitted. To carry on with changes you have started but not submitted, click the link beside 'Pending Registration Return'.)

# **View and Create Lobbying Activity Reports**

View existing and create new Lobbying Activity Reports associated with current Registration Returns under the "Current Registrations" tab.



# **Update Registration Return**

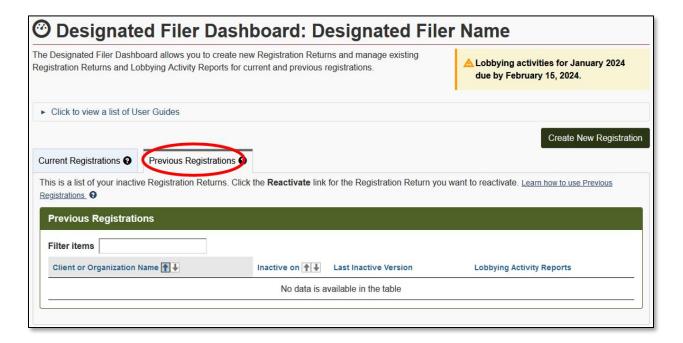
Still under the "Current Registrations" tab, you will see one or more of the following links beside Pending Registration Return/Active Registration Return. You may update a current Registration Return by clicking the appropriate link beside 'Pending Registration Return' or 'Active Registration Return'.

View 9	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 •	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 <b>⊕</b>	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 0	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 days of resuming
	lobbying activity.

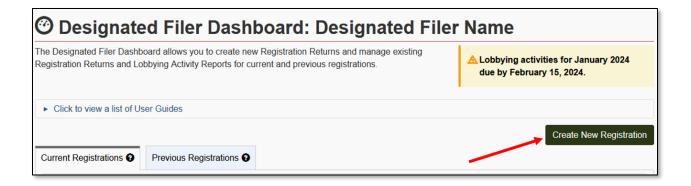
# View and Reactivate Previous Registration Returns and associated Lobbying Activity Reports

Under the "**Previous Registrations**" tab, view previous (**inactive**) Registration Returns and their associated Lobbying Activity Reports.



# **Create new Registration Returns (for new clients or different organizations)**

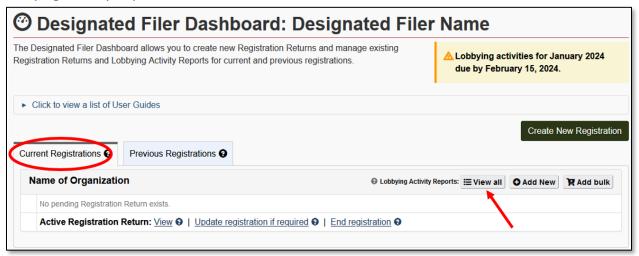
Create new Registration Returns - for new clients or for different organizations – by clicking the "Create New Registration" button.



#### **Lobbying Activity Reports Screen**

Under the "Current Registrations" tab on the Designated Filer Dashboard, you can see existing Lobbying Activity Reports associated with your active Registration Returns. On the right-hand side, beside "Lobbying Activity Reports" for the appropriate Registration Return, click "View All".

The Lobbying Activity Reports screen allows you to view, amend, cancel, and finish incomplete Lobbying Activity Reports.



Click "View All" to see all existing Lobbying Activity Reports for this Registration Return and the status of each.

- Published Visible to the public
- Published Amendment Visible to the public. Report has been amended
- On-Hold Certified and submitted, will not be visible to the public until the 15<sup>th</sup> of the month
- Incomplete In progress. Not visible to the public. Has not been submitted.

 Certification Required – Awaiting certification. Not visible to the public. Has not been submitted.

# INFORMATION ON THE MONTHLY RETURN PROCESS

#### Monthly Returns: Updates to Registration Returns and Lobbying Activity Reports

Each month that you have an active Registration Return, you must determine whether you need to submit a Monthly Return; that is, you must determine whether to submit an update to your Registration Return and whether you need to file Lobbying Activity Reports.

We recommend you diarize a reminder for the first week of each month to make sure the information in your Registration Return is up to date and prepare/file Lobbying Activity Reports for the preceding month if needed.

In any given month, if you have no lobbying of senior public office holders to report, and all the information in your Registration Return is accurate and up to date, you are not required to file anything with the Lobbyists Registry.

# When to Create a Lobbying Activity Report

You must create and file a Lobbying Activity Report if you or an in-house lobbyist for your organization lobbied one or more **senior public office holders** in the previous month.

Senior public office holders include the following positions:

- Premier and ministers (members of the Executive Council)
- Staff of premier/staff of ministers (other than administrative support staff)
- MLA
- Staff of MLAs (other than administrative support staff)
- Parliamentary secretary
- Deputy minister, chief executive officer or a position of comparable rank in a ministry
- Associate deputy minister, assistant deputy minister or a position of comparable rank in a ministry
- Senior or next most senior ranking executive position of a Provincial entity
- Chair or vice chair of, or the equivalent position in, the governing body of a Provincial entity

If you or an in-house lobbyist for your organization lobbied a public office holder who is not a senior public office holder, do not file a Lobbying Activity Report for that activity. Just make sure your Registration Return is up to date: your Registration Return must include the ministry or Provincial entity in which the public office holder is employed, as well as the topic of lobbying communication directed at the public office holder.

For more information on the difference between a "public office holder" and a "senior public office holder", see the "Public office holders, senior public office holders, former public office holders" section on the FAQ page.

# CONSULTANT LOBBYIST - UPDATE REGISTRATION RETURN AND/OR CREATE LOBBYING ACTIVITY REPORT

#### **Review and Update a Registration Return**

If you have not lobbied any senior public office holders on behalf of a client, you only need to ensure that the information in the relevant Registration Return is up to date for the month.

- Go to the Lobbyists Registry sign-in page <a href="https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn">https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn</a> and Sign in to your account.
- 2. On the Designated Filer Dashboard, make sure you are working under the "Current Registrations" tab.
- 3. Locate the Registration Return you wish to review and click "View".
- 4. Review the Registration Return carefully to make sure it is up to date.
- 5. If you need to make updates, return to the Designated Filer Dashboard and click the appropriate link beside 'Pending Registration Return' or 'Active Registration Return'. Click beside the link if you are not sure it is the appropriate link.
- On the "Date of Update" screen, enter the date of the change you are reporting. Entering the date the undertaking/lobbying activity will end is optional. Click "Continue".

If the dates are already entered, you can edit (if needed) from the Summary screen.

Pending started on:	2021-10-02
Type:	Registration update
Date when the updates took effect:	2021-10-01 <u>Edit</u>
Date at which this undertaking will end:	2022-01-29 <u>Edit</u>
Status:	Requires Certification

7. From the Consultant Lobbyist Summary screen, you may review and update the information in the Registration Return. To edit information in a particular section, click the **Edit** button in the heading for that section. Click **Save** or **Save and Continue** after making the changes in each section. Once all information is up to date, click "**Proceed to Certification**" at bottom right of the summary screen.



8. Make sure the **date when the updates took effect is correct.** Tick the check boxes. Enter the Designated Filer's Account username and Account password. Click "**Submit**".

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

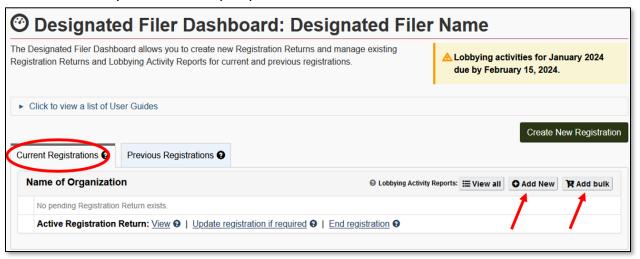
#### Review your Registration Return and Create a Lobbying Activity Report

1. Go to the Lobbyists Registry sign-in page and **Sign in** to your account: <a href="https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn">https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn</a>

- 2. On the Designated Filer Dashboard, make sure you are working under the "Current Registrations" tab.
- 3. Locate the Registration Return for which you need to file a Lobbying Activity Report.

On the right-hand side, beside "Lobbying Activity Reports" for the appropriate Registration Return, click "Add new" to add a single Lobbying Activity Report.

Alternatively, you can click "**Add bulk**" to enter <u>multiple</u> Lobbying Activity Reports simultaneously in a "Bulk Entry" style interface.

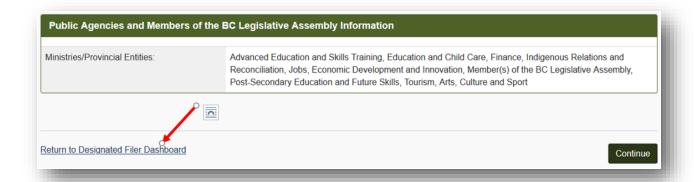


4. You must review & confirm the information in your Registration Return as the first step. If the information in your Registration Return is complete and up to date, tick the **check boxes** to confirm, then click "**Continue**".

If you need to make updates, follow the instructions in steps 5 - 10 below.

If you do not need to make updates, skip to step 11.

5. If you need to make updates to your Registration Return, click the "Return to Designated Filer Dashboard" link at the bottom left of the screen.



- 6. From your Dashboard, go to the correct Registration Return. Click the appropriate link beside 'Pending Registration Return' or 'Active Registration Return'. Click beside the link if you are not sure it is the appropriate link.
- 7. On the date screen, enter the date of the change you are reporting. Entering the date the undertaking/lobbying activity will end is optional. Click "Continue".
- 8. From the Consultant Lobbyist Summary screen, review and update the information in the Registration Return. To edit information in a particular section, click the **Edit** button in the heading for that section. Click **Save** or **Save and Continue** after making the changes in each section.
- 9. Once all information in each section is up to date, click "**Proceed to Certification**" at bottom right of the Consultant Lobbyist Summary screen.

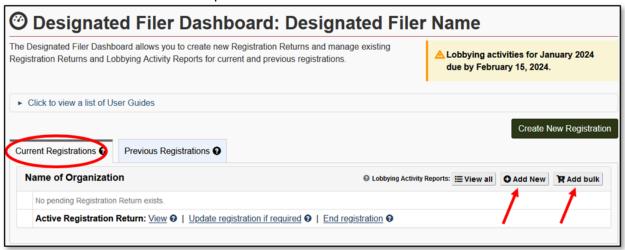


10. Make sure the date when the updates took effect is correct. Tick the check boxes. Enter the Designated Filer's Account username and Account password. Click "Submit".

<u>NOTE: If you are a Representative</u> preparing this update on behalf of the consultant lobbyist/Designated Filer, you will not be able to submit the update with your own username and password. The update to the Registration Return can only be submitted after entering the Designated Filer's username and password.

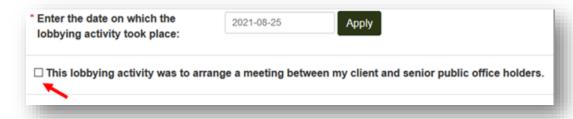
- 11. Once the changes have been submitted, return to the Designated Filer Dashboard and locate the correct Registration Return again. The updated version of your Registration Return will show as "Pending" and will be reviewed by Registry staff.
- 12. To create a <u>single</u> Lobbying Activity Report, click on the "Add new" link and follow the instructions in steps 13 34 below.

To submit <u>more than one</u> Lobbying Activity Report at a time, click the "Add bulk" link and follow instructions in steps 35 - 51.

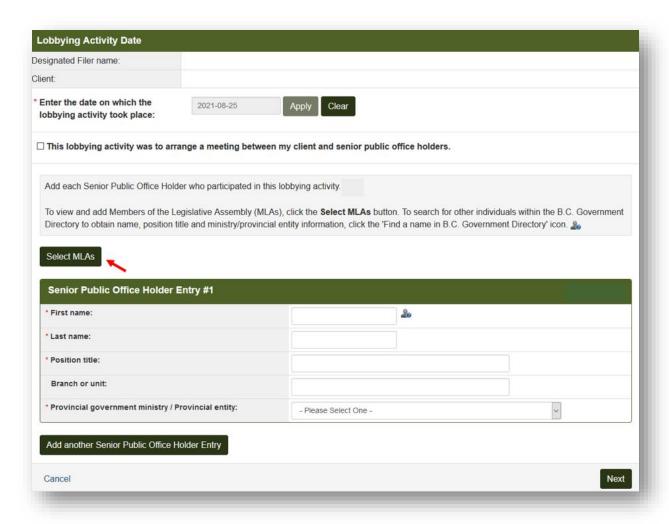


# Add Individual Lobbying Activity Report - "Add new"

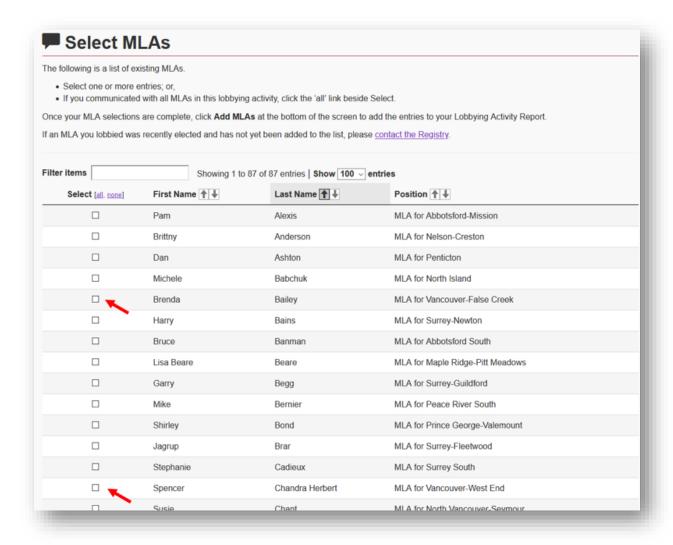
- 13. To enter one Lobbying Activity Report at a time, click "Add new".
- 14. Enter the date on which the lobbying activity took place and click "Apply".
- 15. If the lobbying activity was to arrange a meeting for the purpose of lobbying, between your client or colleagues with a senior public office holder, tick the check box.



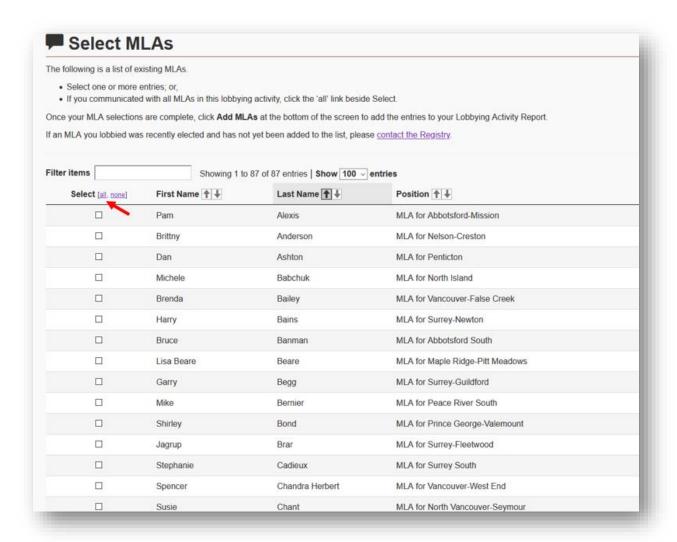
- 16. Add the name, position title and ministry or Provincial entity of each Senior Public Office Holder who participated in this lobbying activity.
- 17. To add Members of the Legislative Assembly (MLAs), click the **Select MLAs** button.



18. The list of existing MLAs appears on a new screen. Check the boxes to select one or more MLAs.

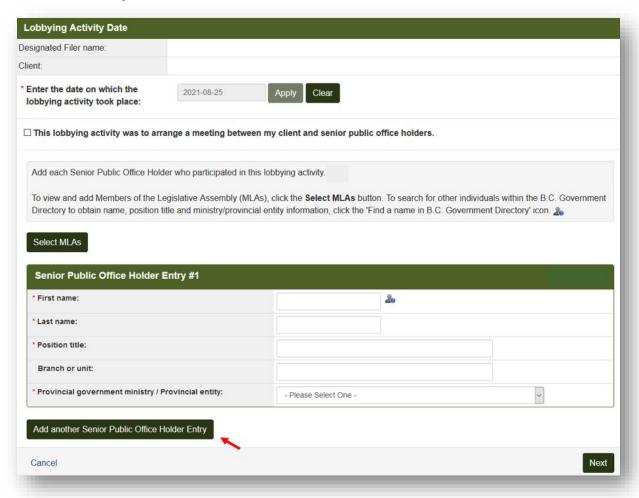


19. If you communicated with **all** MLAs in this lobbying activity, click the '**all**' link beside Select.



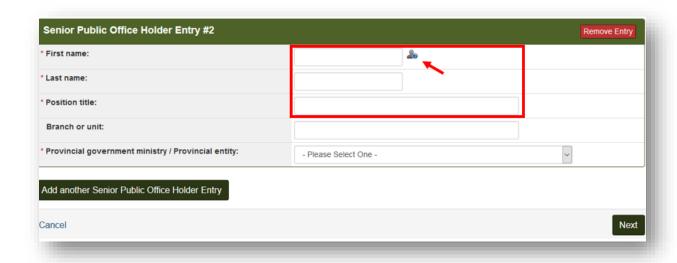
Once your MLA selections are complete, click **Add MLAs** at the bottom of the screen to add the entries to your Lobbying Activity Report.

To add another Senior Public Office Holder who is not an MLA, click **Add another Senior Public Office Holder Entry.** 

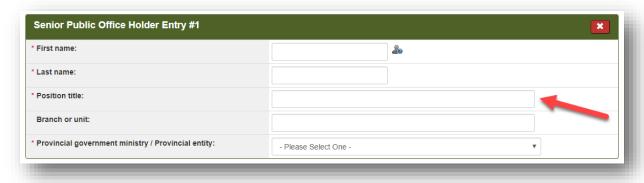


20. Enter the first and last name of the senior public office holder.

Make sure that you spell the individual's name correctly! Click on the ab icon to view the BC Government Directory to double-check names.



21. Enter the individual's Position title. You can also enter the branch or unit.

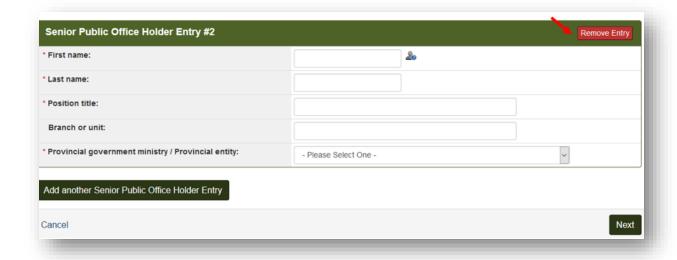


22. Select the senior public office holder's **provincial government ministry** OR **Provincial entity** from the drop-down menu.

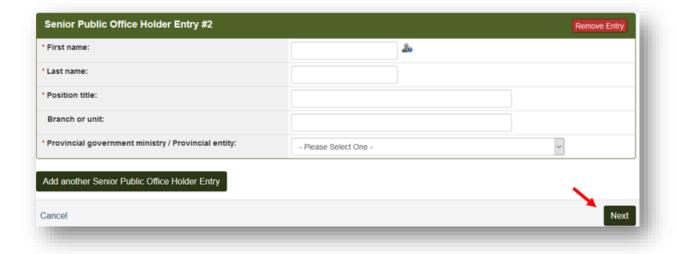
Ministries and Provincial entities you have identified in your Registration Return will be shown at the top of the list.

If you select a government ministry or Provincial entity that is NOT on your Registration Return, it will be added as an update to the Registration Return. You will need to certify and submit your updated Registration Return by the deadline for Monthly Returns.

23. To remove an entire entry, click "Remove Entry".

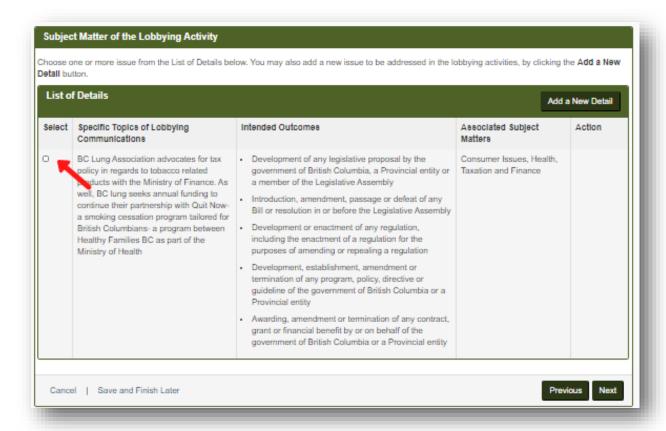


24. When you have entered all senior public office holders who were lobbied in this activity, click "Next" to continue to the next step.



# **Next Step: Subject Matter of the Lobbying Activity**

25. Identify one or more lobbying topics from the list by selecting the check boxes.



26. If you need to add new topics of lobbying communications, click "Add a New Detail".



27. Describe the new topic, check at least one box to add associated intended outcomes, select the associated subject matters, then click **Save**.

The new topic of lobbying communications will be added to your Registration Return as an update. You will later need to certify and submit your updated Registration Return.

**Note:** While you are preparing this Lobbying Activity Report, you can Edit or Remove information in this section that was added as part of <u>this</u> Lobbying Activity Report. If you need to Edit or Remove other information in this section you must do so via an update to your Registration Return.

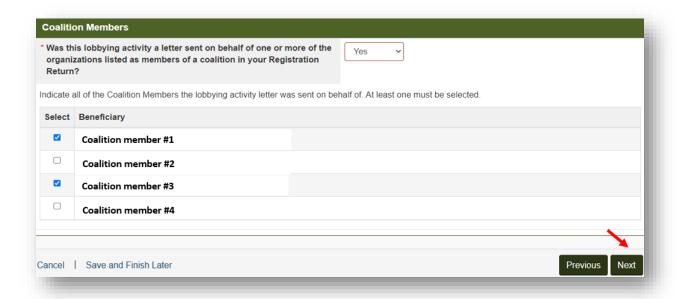


28. When the information is complete, click "Next" to continue to the next step.

NOTE: If the related Registration Return does not indicate that your client is a member of a coalition, you will not see the next screens in the Lobbying Activity Report form. If your client is not a member of a coalition, skip to step 31 of this guide (Last Step: Certify Lobbying Activity Report).

#### **Next Step: Letter Sent on Behalf of Coalition Members**

- 29. If the lobbying activity you are declaring in this report is not a letter sent on behalf of one or more of the organizations listed as members of a coalition in your Registration Return, select 'No', then click 'Next'.
  - If the lobbying activity you are declaring in this report is a letter sent on behalf of one or more of the organizations listed as members of a coalition in your Registration Return, select 'Yes'.
- 30. Select the organizations that are coalition members and signed or endorsed the letter that you communicated to a senior public office holder, then click 'Next'.



#### **Last Step: Certify Lobbying Activity Report**

- 31. Review the information you entered in this report. When you are sure your report is accurate, tick the "I certify..." checkbox near the bottom of the screen.
- 32. You have the option of publishing the Lobbying Activity Report now, or having it published on the next deadline for Monthly Returns.

<u>To publish the Lobbying Activity Report now</u>, select "**Publish Now**" from the drop-down menu.

To publish the Lobbying Activity Report on the next deadline for Monthly Returns, select "Publish [date]" from the drop-down menu.

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

If you are a Representative preparing this Lobbying Activity Report on behalf of the consultant lobbyist/Designated Filer, you will not be able to submit the Lobbying Activity Report using your own username and password. The Lobbying Activity Report can only be submitted after entering the Designated Filer's username and password.

34. The Lobbying Activity Report Confirmation screen confirms that you have successfully submitted a Lobbying Activity Report.

If you have more Lobbying Activity Reports to submit, click "Return to Designated Filer Dashboard" at the bottom of the screen to repeat the process.

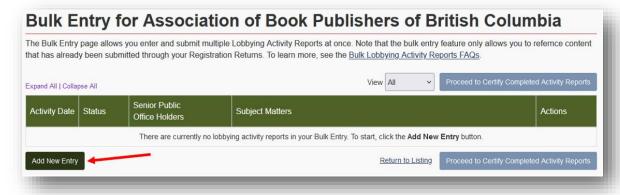


# Bulk Entry - "Add bulk" to Add Multiple Lobbying Activity Reports at Once

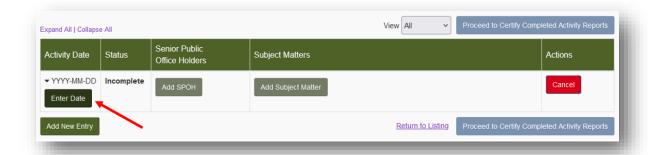
35. Click the "Add bulk" button to bring you to the Bulk Entry interface, where you can create multiple Lobbying Activity Reports and certify/submit them all together at one time.

**Note:** you will **NOT** be able to add new information that is not already included in the underlying Registration Return. For example, you will **NOT** be able to add a new Ministry or Provincial Entity that is not already listed in your Registration Return. You will first need to submit a Registration Return Update that includes any "new" information before that new information is accessible through the Bulk Lobbying Activity Report interface.

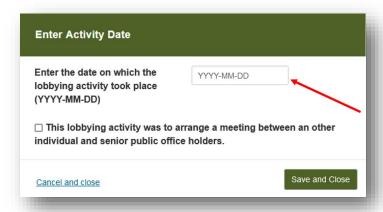
36. To create a new Lobbying Activity Report, click the "Add New Entry" button.



37. Click the "Enter Date" button.



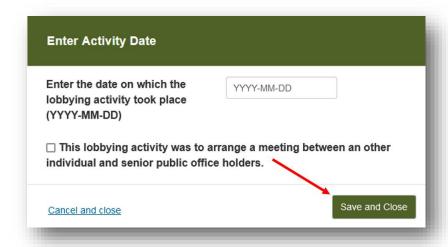
A pop-up menu will appear. Enter the date on which the lobbying activity took place.



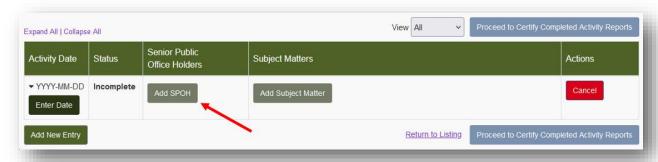
If the lobbying activity was to arrange a meeting for the purpose of lobbying between your client or colleagues with a senior public office holder, tick the check box.

Enter Activity Date	
Enter the date on which the lobbying activity took place (YYYY-MM-DD)  This lobbying activity was to a individual and senior public office.	rrange a meeting between an other te holders.
Cancel and close	Save and Close

Click "Save and Close".



38. Click "Add SPOH" to identify every "senior public office holder" (SPOH) who was the target of this lobbying activity.

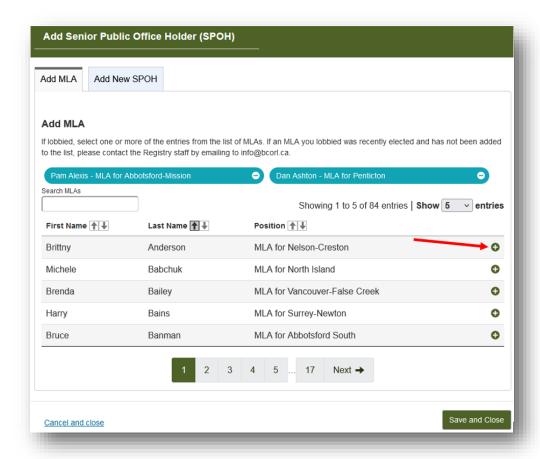


A pop-up screen will appear with two tabs: "Add MLA" and "Add New SPOH".

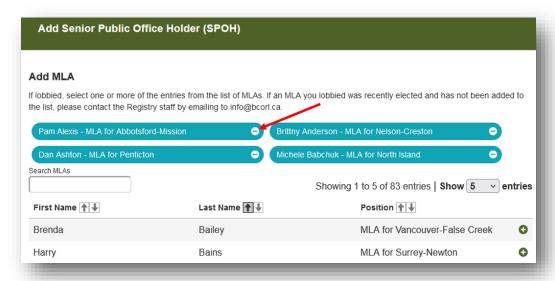
39. To add an MLA, first click on the "Add MLA" tab.



Next, click the button beside the MLA's name. This MLA's name will appear in a blue bubble above the list of MLAs.



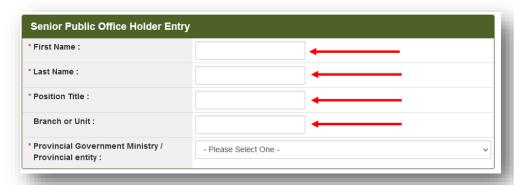
To remove an MLA from your list, click the button beside the MLA that you would like to remove.



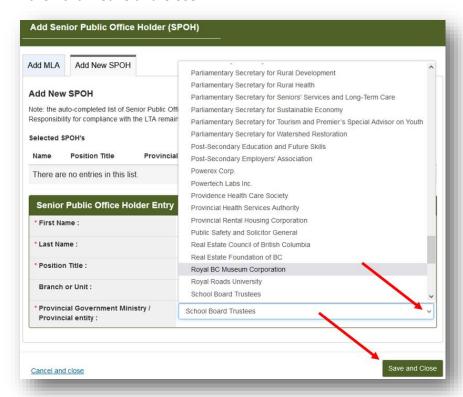
40. To add a SPOH who is not an MLA, select the "Add New SPOH" tab.



Next, enter information about the SPOH, including First and Last Name and Position Title. Including information about the SPOH's Branch or Unit is optional.



Select the "Provincial Government Ministry/Provincial entity" from the drop-down list, then click "Save and Close".



Activity Date Status Senior Public Office Holders Coalition Members Subject Matters Actions

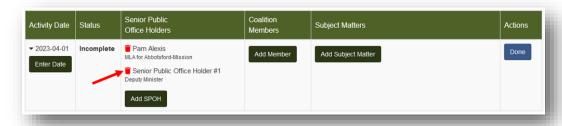
\* 2023-04-01 Incomplete Parm Alexis MLA for Abbots for 4-Mission Senior Public Office Holder #1 Deputy Minister Add SPOH

Add SPOH

Actions Subject Matters Add Subject Matter Done

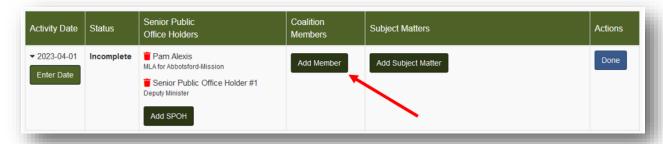
To add another SPOH, click "Add SPOH" and repeat the above steps.

To remove a SPOH from your list, click the full button beside the SPOH's name.

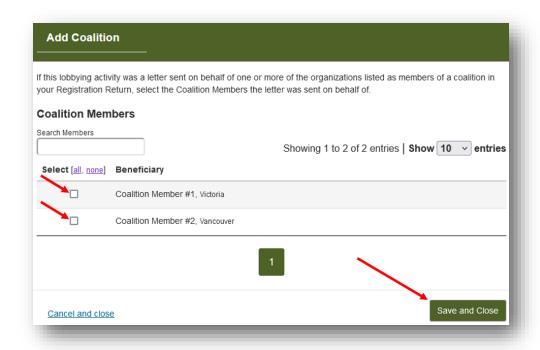


NOTE: If your Registration Return does not indicate that your client is a member of a coalition, you will not see the "Coalition Members" column. If your client is not a member of a coalition, skip to step 42 of this guide.

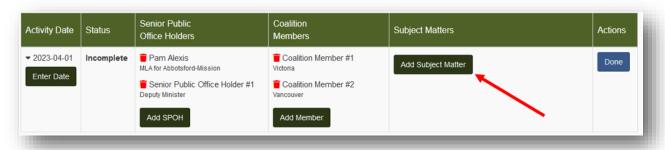
41. If this lobbying activity was a coalition lobbying activity, you will need to identify which coalition members participated by clicking the "Add Member" button.



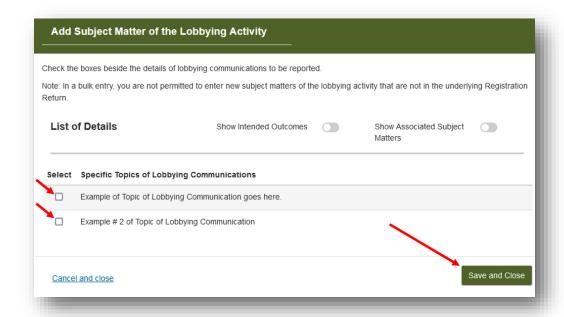
Click the box beside the relevant coalition member(s) that participated in this lobbying activity, then click "Save and Close".



42. Next, identify the Subject Matter of the lobbying activity by clicking "Add Subject Matter".



In the pop-up screen that appears, click the box for any relevant "Specific Topic of Lobbying Communication", then click "Save and Close".



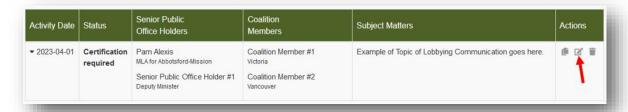
Once the information for this Lobbying Activity Report has been completed, you will see that the "Status" of this Lobbying Activity Report has now changed from "Incomplete" to "Certification required".

43. Review the information you have entered for this Lobbying Activity Report and revise/edit as necessary.

Once you are sure it is complete and accurate, click "Done".



44. If information in your Lobbying Activity Report requires correction, you can click the button.



45. To delete the Lobbying Activity Report, click the button.



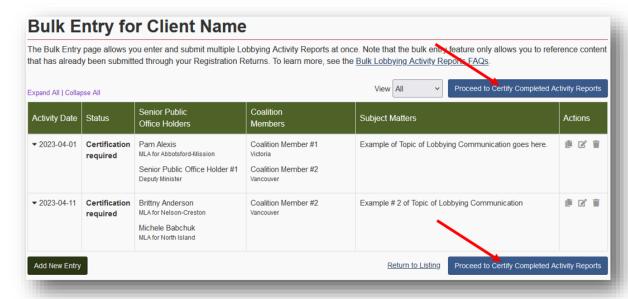
46. To duplicate the Lobbying Activity Report, click the button.



47. To add additional Lobbying Activity Reports, click "Add New Entry" and repeat the steps outlined above.



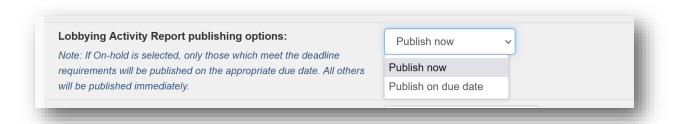
48. Once you have finished adding Lobbying Activity Reports, click "Proceed to Certify Completed Activity Reports".



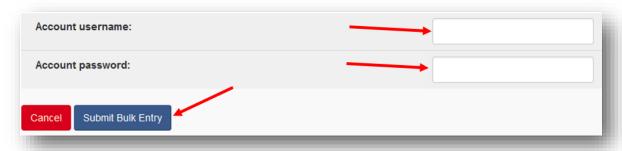
49. Check the box to certify the accuracy of the information in the Lobbying Activity Reports.



50. Choose when to publish the Lobbying Activity Reports. You can choose to publish immediately by selecting "Publish now." Alternatively, you can choose "Publish on due date" to publish on the reporting deadline.



51. Enter the Consultant Lobbyist's Username and Password, then click "Submit Bulk Entry".



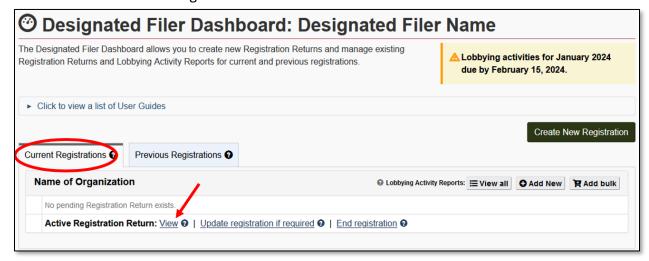
For additional information on submitting Lobbying Activity Reports using the Bulk Entry method, see the <u>Bulk Lobbying Activity Reports FAQs</u> section at the end of this document.

# ORGANIZATION – UPDATE REGISTRATION RETURN AND/OR CREATE LOBBYING ACTIVITY REPORT

# **Review and Update your Registration Return**

If in-house lobbyists for your organization have not lobbied any senior public office holders, you only need to ensure that the information in the Registration Return is up to date.

- 1. Go to the Lobbyists Registry sign-in page <a href="https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn">https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn</a>. Sign in to your account.
- 2. On the Designated Filer Dashboard, make sure you are working under the "Current Registrations" tab.
- Locate the Active Registration Return and click "View".



- 4. Review the Registration Return carefully to make sure it is up to date.
- 5. If you need to make updates, return to the Designated Filer Dashboard and click the appropriate link beside 'Pending Registration Return' or 'Active Registration Return'. Click beside the link if you are not sure it is the appropriate link.

On the "Date of Update" screen, enter the date of the change you are reporting. Click "Continue".

If the dates are already entered, you can edit from the Organization Summary screen.

Pending started on:	2021-10-02
Type:	Registration update
Date when the updates took effect:	2021-10-01 <u>Edit</u>
Date at which this undertaking will end:	2022-01-29 <u>Edit</u>
Status:	Requires Certification

- 6. From the Organization Summary screen, review and update the information in the Registration Return.
- 7. To edit the information in a particular section, click the **Edit** button in the heading for that section. Click **Save** or **Save and Continue** after making the changes in each section.
- 8. Once all information is up to date, click "**Proceed to Certification**" at bottom right of the summary screen.



9. Make sure the **date when the updates took effect is accurate.** Read and tick the check boxes. Enter the Designated Filer's **username** and **password**. Click "**Submit**".

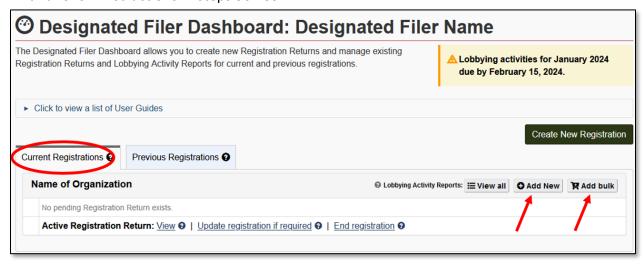
If you are a Representative preparing this Lobbying Activity Report on behalf of the Designated Filer, you will not be able to submit the Lobbying Activity Report with your own username and password. The Lobbying Activity Report can only be submitted after entering the Designated Filer's username and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

#### **Update your Registration Return and Create a Lobbying Activity Report**

- Go to the Lobbyists Registry sign-in page <a href="https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn">https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn</a> and Sign in to your account.
- 2. Once signed in, you'll be on the Designated Filer Dashboard. Make sure you are on the "Current Registrations" tab.
- 3. Locate the Registration Return. On the right-hand side, under Lobbying Activity Reports, click "Add new" or "Add bulk".

To create a <u>single</u> Lobbying Activity Report, click on the "Add new" link and follow the instructions in steps 13 - 35 below.

To submit <u>more than one</u> Lobbying Activity Report at a time, click the "Add bulk" link and follow instructions in steps 36 - 59.

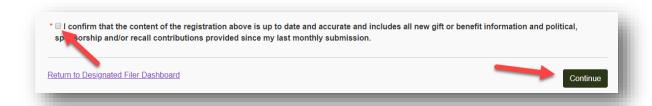


4. You must review & confirm the information in your Registration Return as the first step.

NOTE: If you have already verified the content of your Registration Return **today** (either you just submitted the Registration Return today OR you have already verified it with a previous Lobbying Activity Report created today), you will not be required to review and verify your registration a second time on the same calendar day. In this case, proceed to

<u>Step 1: Date and Senior Public Officer Holders</u>. Otherwise continue with the steps below.

5. If the information in your Registration Return is complete and accurate, tick the **check box** at the bottom of the screen and click "**Continue**". Skip to step 12 below.



If you need to make updates, follow the instructions in steps 6 - 12 below:

- 6. Return to the Designated Filer Dashboard, locate the Registration Return and click the appropriate link beside 'Pending Registration Return' or 'Active Registration Return'. Click beside the link if you are not sure it is the appropriate link.
- 7. On the "Date of Update" screen, enter the date of the change you are reporting. Click "Continue".
- 8. From the Organization Summary screen, click the "**Edit**" button beside the sections you need to update.
- 9. Enter updates and save the information. Once all updates are complete, click on "Proceed to Certification".



10. Make sure the date when the updates took effect is correct (the date the changes occurred) and enter the Designated Filer's Account username and Account password. Click "Submit".

<u>If you are a Representative</u> preparing this update to the Registration Return on behalf of the Designated Filer, you will not be able to submit the update with your own username

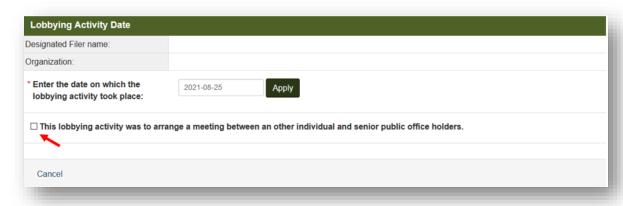
and password. The update to the Registration Return can only be submitted after entering the Designated Filer's username and password.

- 11. Once the updated Registration Return has been submitted for activation, return to the Designated Filer Dashboard. The latest update to your Registration Return will show as "Pending" while under review by Registry staff.
- 12. In the meantime, you can proceed with creating a Lobbying Activity Report by clicking on the "Add new" or "Add bulk" link.

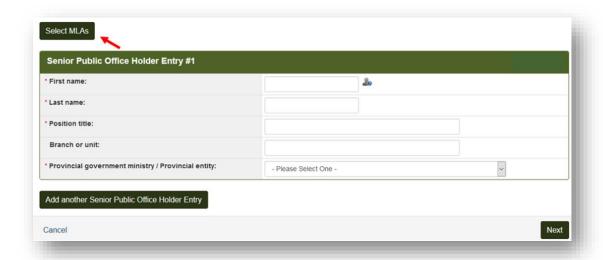


#### Add Individual Lobbying Activity Report - "Add new"

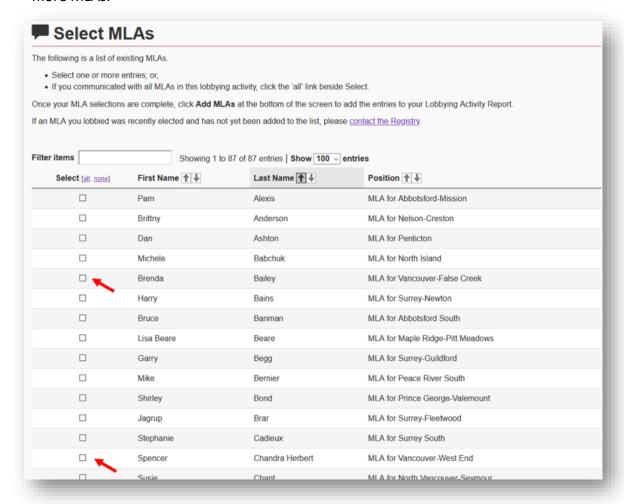
- 13. Enter the date on which the lobbying activity took place and click "Apply"
- 14. If the lobbying activity was to arrange a meeting for the purpose of lobbying between other individuals and a senior public office holder, tick the check box.



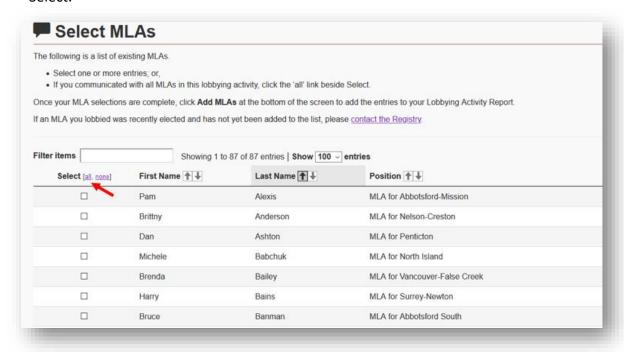
15. To add Members of the Legislative Assembly (MLAs), click the **Select MLAs** button.



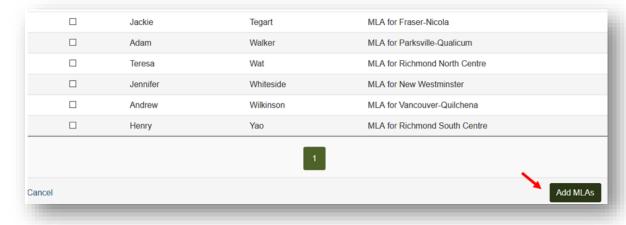
16. The list of existing MLAs appears on a new screen. Check the boxes to select one or more MLAs.



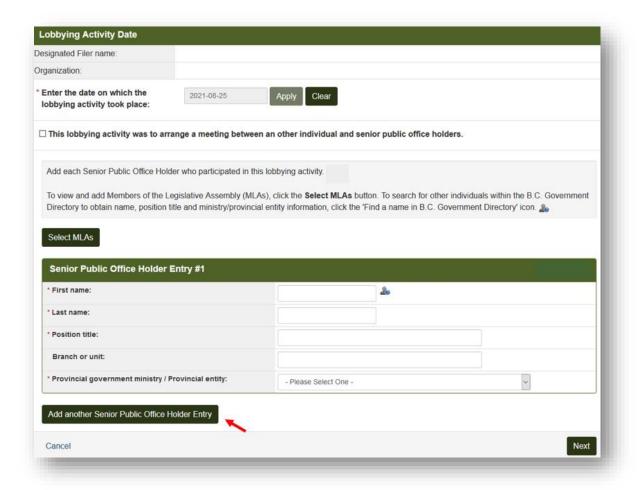
17. If you communicated with **all** MLAs in this lobbying activity, click the '**all**' link beside Select.



18. Once your MLA selections are complete, click **Add MLAs** at the bottom of the screen to add the entries to your Lobbying Activity Report.

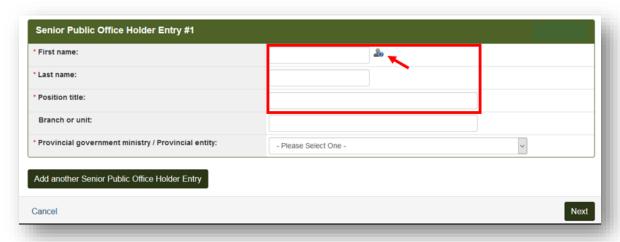


19. To add another Senior Public Office Holder who is not an MLA, click **Add another Senior Public Office Holder Entry.** 



Enter the first and last name of the senior public office holder.

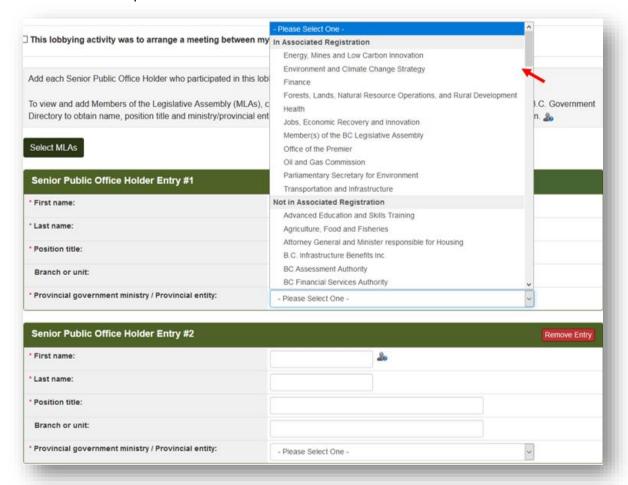
Make sure that you spell the individual's name correctly! Click on the ab icon to view the BC Government Directory to double-check names.



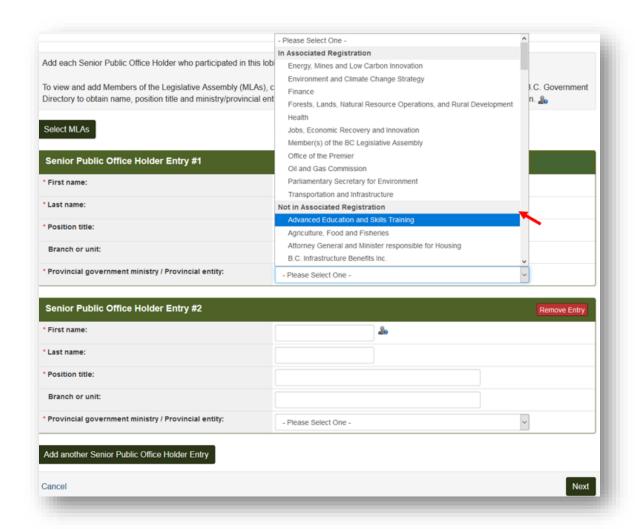
20. Enter the individual's **Position title**. You can also enter the branch or unit.

Select the senior public office holder's **provincial government ministry** OR **Provincial entity** from the drop-down menu.

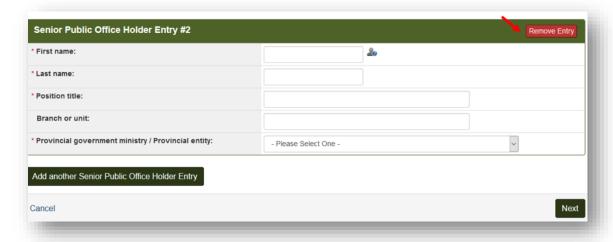
Ministries and Provincial entities you have identified in your Registration Return will be shown at the top of the list.



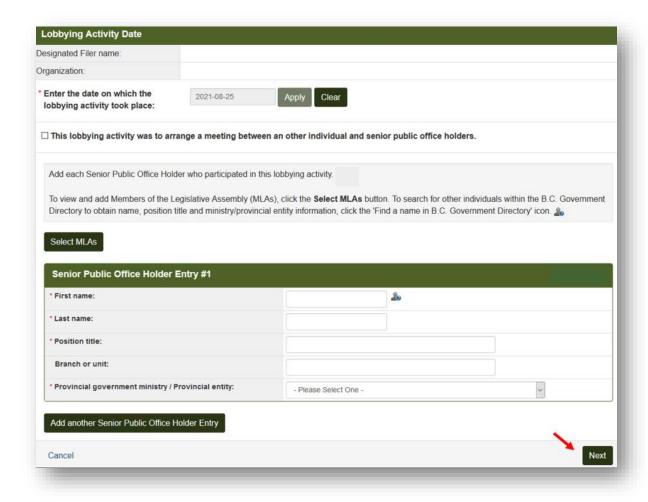
If you select a government ministry or Provincial entity that is NOT on your Registration Return, it will be added to your Registration Return as an update. Certify and submit your updated Registration Return by the deadline for Monthly Returns.



21. To remove an entire entry, click "Remove Entry".

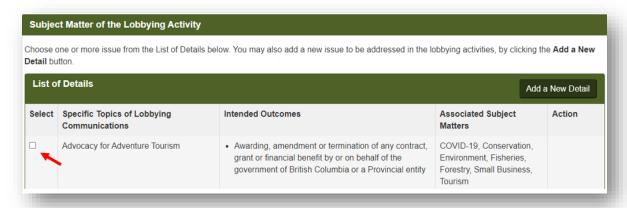


22. When you have entered all senior public office holders who were lobbied in this activity, click "Next" to continue to the next step.

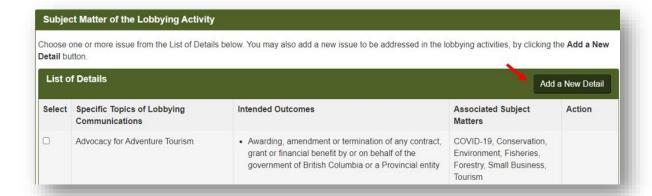


#### **Next Step: Subject Matter of the Lobbying Activity**

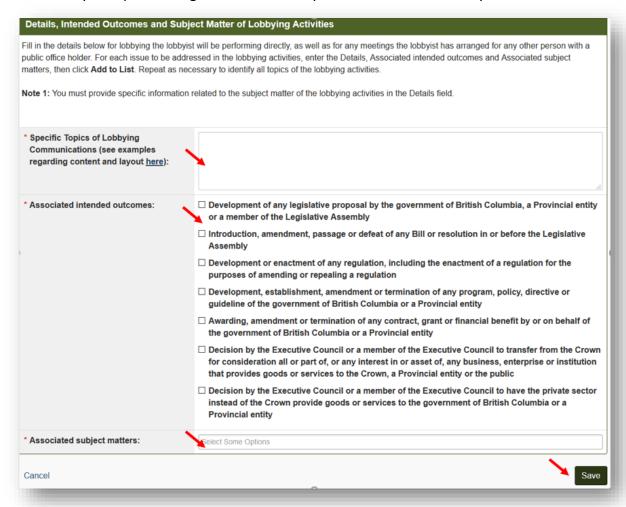
23. Identify one or more lobbying topics from the list by selecting the check boxes.



24. If you need to add additional lobbying topics, click on the "Add a New Detail" button.



New lobbying topics will be added to your Registration Return as an update. Certify and submit your updated Registration Return by the deadline for Monthly Returns.



**Note:** While you are preparing this Lobbying Activity Report, you can **Edit** or **Remove** the information in this section that was added as part of <u>this</u> Lobbying Activity Report. If

you need to Edit or Remove other information in this section you must do so via an update to your Registration Return.



25. When the information is complete, click "Next" to continue to the next step.

#### Next Step: Lobbyists Who Performed the Lobbying Activity

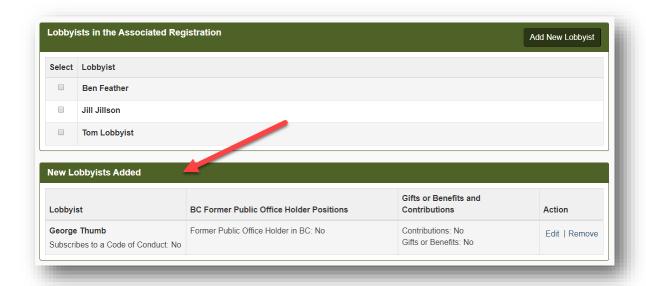
26. Select the lobbyists who performed the lobbying activity by using the **check boxes**.



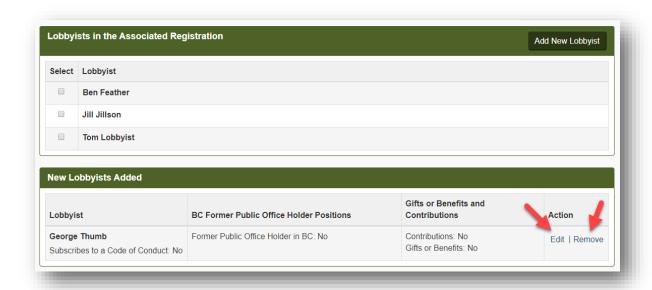
27. If you need to add additional lobbyists, click on the "Add a New Lobbyist" button.



Newly added in-house lobbyists will appear below and be added to this Lobbying Activity Report. They will also be added to your Registration Return as an update. Certify and submit the updated Registration Return by the deadline for Monthly Returns.



**Note:** While you are preparing this Lobbying Activity Report, you can Edit or Remove inhouse lobbyists who were added as part of this Lobbying Activity Report. If you need to Edit or Remove other in-house lobbyists you must do so via an update to your Registration Return.



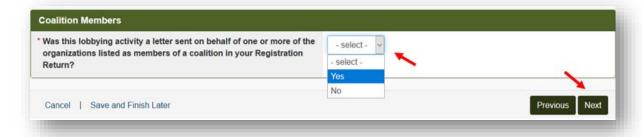
28. When the information in this section is complete, click "Next" to continue to the next step.



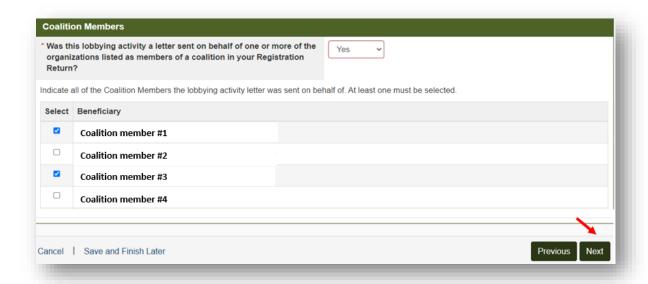
NOTE: If your Registration Return does not indicate that your organization is a member of a coalition, you will not see the next screens in the Lobbying Activity Report form. If your organization is not a member of a coalition, skip to step 32 of this guide (Last Step: Certify Lobbying Activity Report).

#### **Next Step: Letter Sent on Behalf of Coalition Members**

29. If the lobbying activity you are declaring in this report is NOT a letter sent on behalf of one or more of the organizations listed as members of a coalition in your Registration Return, select 'No' then click 'Next'.

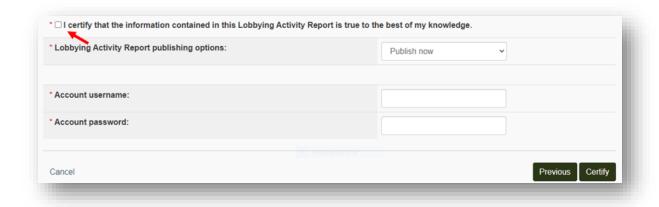


- 30. If the lobbying activity you are declaring in this report is a letter sent on behalf of one or more of the organizations listed as members of a coalition in your Registration Return, select 'Yes'.
- 31. Select the organizations that are coalition members and signed or endorsed the letter that your organization communicated to a senior public office holder, then click 'Next'.



#### **Last Step: Certify Lobbying Activity Report**

32. Review the information you entered in this report. When you are sure your report is accurate, tick the "I certify..." checkbox near the bottom of the screen.



33. You have the option of publishing the Lobbying Activity Report now or having it published on the next deadline for Monthly Returns.

To publish the Lobbying Activity Report now, select "**Publish Now**" from the drop-down menu.

To publish the Lobbying Activity Report on the next deadline for Monthly Returns, select "Publish [date]" from the drop-down menu.

34. Enter the Designated Filer's username and password and click "**Certify**" to submit for activation.

**Note:** <u>If you are a Representative</u> preparing this Lobbying Activity Report on behalf of the Designated Filer, you will not be able to submit the Lobbying Activity Report with your own username and password. The Lobbying Activity Report can only be submitted after entering the Designated Filer's username and password.

35. The Lobbying Activity Report Confirmation screen confirms that you have successfully submitted a Lobbying Activity Report.

If you have more Lobbying Activity Reports to submit, click "Return to Designated Filer Dashboard" at the bottom of the screen to repeat the process.



#### "Bulk Entry – "Add bulk" to Add Multiple Lobbying Activity Reports at Once

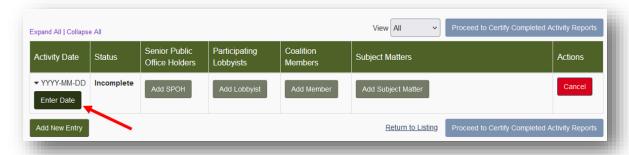
36. Click the "Add bulk" button to go to the Bulk Entry interface, where you can create multiple Lobbying Activity Reports and certify/submit them all together at one time.

<u>Note:</u> you will <u>NOT</u> be able to add new information that is not already included in the underlying Registration Return. For example, you will <u>NOT</u> be able to add a new Ministry or Provincial Entity that is not already listed in your Registration Return. You will first need to complete and submit a Registration Return Update to include any "new" information before that new information is accessible through the Bulk Lobbying Activity Report interface.

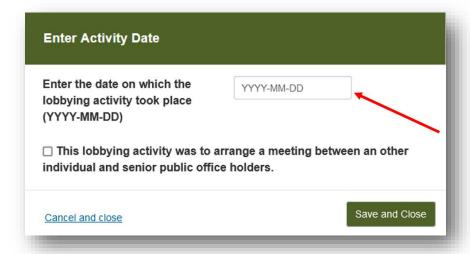
To create a new Lobbying Activity Report, click the "Add New Entry" button.



37. Click the "Enter Date" button.

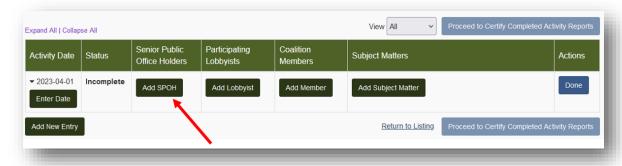


38. A pop-up menu will appear. Enter the date on which the lobbying activity took place.



- 39. If the lobbying activity was to arrange a meeting for the purpose of lobbying, between your client or colleagues with a senior public office holder, tick the check box.
- 40. Click "Save and Close".

41. Click "Add SPOH" to identify every "senior public office holder" who was the target of this lobbying activity.

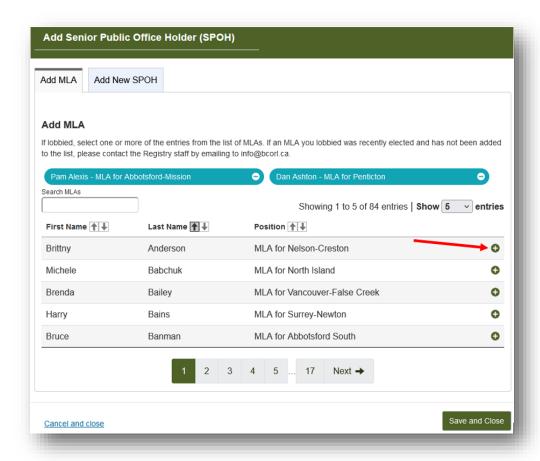


A pop-up screen will appear with two tabs: "Add MLA" and "Add New SPOH".

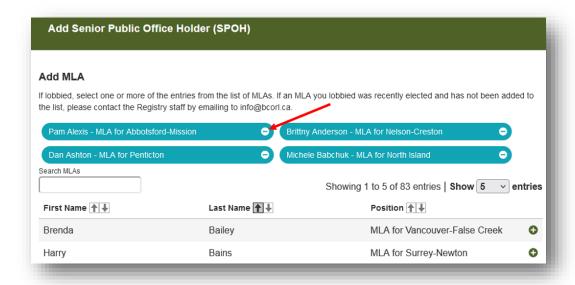
42. To add an MLA, first click on the "Add MLA" tab.



Next, click the button beside the MLA's name. This MLA's name will appear in a blue bubble above the list of MLAs.



To remove an MLA from your list, click the button beside the MLA that you would like to remove.



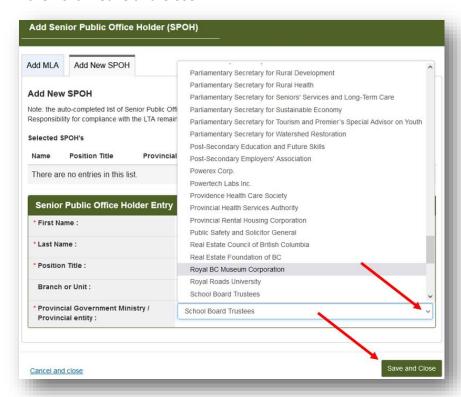
43. To add a SPOH who is not an MLA, select the "Add New SPOH" tab.



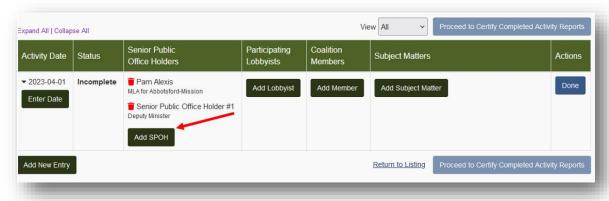
Next, enter information about the SPOH, including First and Last Name and Position Title. Including information about the SPOH's Branch or Unit is optional.



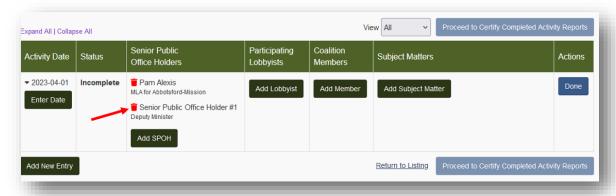
Select the "Provincial Government Ministry/Provincial entity" from the drop-down list, then click "Save and Close".



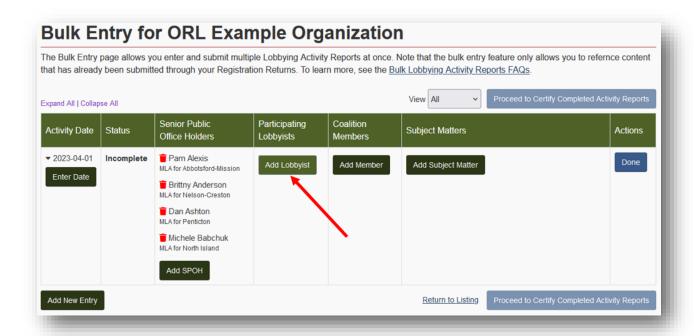
To add another SPOH, click "Add SPOH" and repeat the above steps.



To remove a SPOH from your list, click the • button beside the SPOH's name.



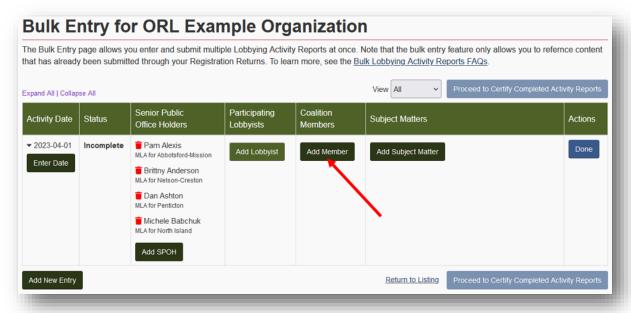
44. Identify which in-house lobbyists were involved in this lobbying activity by clicking "Add Lobbyist".



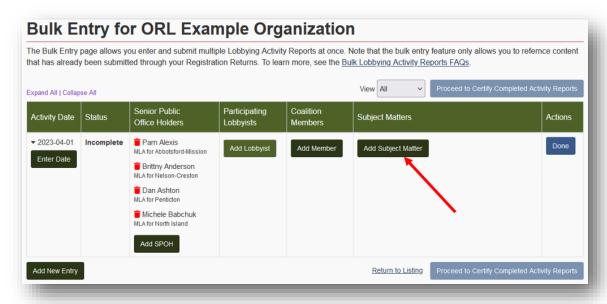
45. In the pop-up menu that appears, click the box for each in-house lobbyist that was involved, then click "Save and Close".

NOTE: If your Registration Return does not indicate that your organization is a member of a coalition, you will not see the "Coalition Members" column. If your organization is not a member of a coalition, skip to step 48 of this guide.

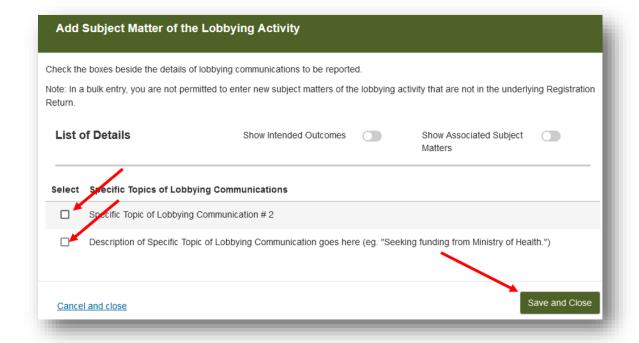
46. If this lobbying activity was a coalition lobbying activity, you will need to identify which coalition members participated by clicking the "Add Member" button.



- 47. In the pop-up screen that appears, click the box for each coalition member that was involved, then click "Save and Close".
- 48. Next, identify the Subject Matter of the lobbying activity by clicking "Add Subject Matter".



49. In the pop-up screen that appears, click the box for any relevant "Specific Topic of Lobbying Communication", then click "Save and Close".

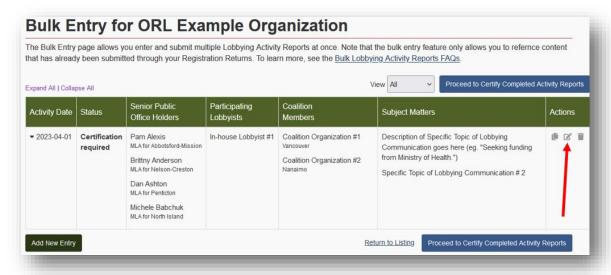


Once the information for this Lobbying Activity Report has been completed, you will see that the "Status" of this Lobbying Activity Report has now changed from "Incomplete" to "Certification Required".

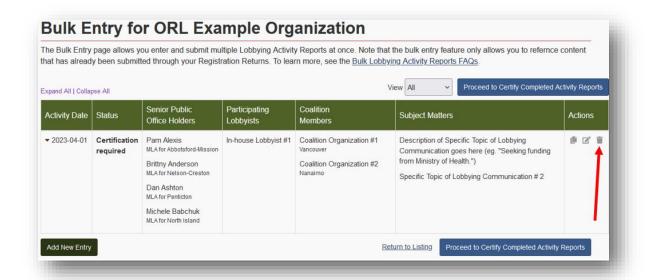
50. Once you have finished entering the necessary information into this Lobbying Activity Report, click "Done".



51. If you see any information in your Lobbying Activity Report that requires correction, you can click the button.



52. To delete the Lobbying Activity Report, click the 🖣 button.



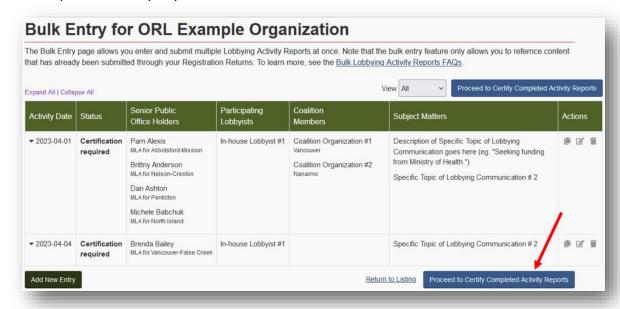
53. To duplicate the Lobbying Activity Report, click the utton.



54. To add additional Lobbying Activity Reports, click "Add New Entry" and repeat the steps outlined above.



55. Once you are finished adding Lobbying Activity Reports, click "Proceed to Certify Completed Activity Reports".



56. Check the box to certify the accuracy of the information in the Lobbying Activity Reports.



57. Confirm the Designated Filer is the current most senior paid officer for your organization.

58. Choose when to publish the Lobbying Activity Reports. You can choose to publish immediately by selecting "Publish now." Alternatively, you can choose "Publish on due date" to publish on the reporting deadline (15<sup>th</sup> of the month following the month in which the lobbying activity occurred).



59. Enter the Designated Filer's Username and Password, then click "Submit Bulk Entry".

For additional information on submitting Lobbying Activity Reports using the Bulk Entry method, see the <u>Bulk Lobbying Activity Reports FAQs</u> section at the end of this document.

# SAVING AND RESUMING PARTIALLY COMPLETED LOBBYING ACTIVITY REPORTS

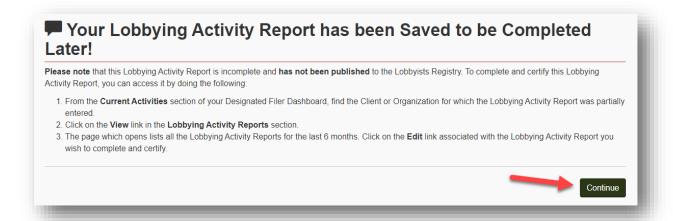
#### **Save and Finish Later**

You can save a partially completed Lobbying Activity Report and finish it later.

1. Instead of "Next", click "Save and Finish Later".



2. You will be notified that your Lobbying Activity Report has been saved but not published. Click "Continue" to return to your List of Lobbying Activity Reports.



#### **Resume a Partially Completed Lobbying Activity Report**

 From the Designated Filer Dashboard, under the Current Registrations tab, locate the Registration Return with the partially completed Lobbying Activity Report. In the Lobbying Activity Reports section click "View All".



- 2. Locate the Lobbying Activity Report you need to complete and click "Edit".
- Review the information in the Lobbying Activity Report. If it is complete and accurate, "Certify" the Lobbying Activity Report to submit it. The Lobbying Activity Report Confirmation screen confirms that you have successfully submitted a Lobbying Activity Report.

#### **Delete a partially completed Monthly Return**

 From the Designated Filer Dashboard, under the Current Registrations tab, locate the Registration Return with the partially completed Lobbying Activity Report. In the Lobbying Activity Reports section click "View All".



2. Locate the Lobbying Activity Report you need to complete and click "Delete".

Confirm you wish to delete the selected Lobbying Activity Report to remove it from your list.

#### VIEW AND PRINT LOBBYING ACTIVITY REPORTS

#### **View Lobbying Activity Report on a Current Registration Return**

- Go to the Lobbyists Registry sign-in page <a href="https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn">https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn</a> and Sign in to your account.
- 2. Once signed in, you'll be on the Designated Filer Dashboard. Click on the "Current Registrations" tab.
- 3. Locate the Registration Return that has the Lobbying Activity Report(s) that you wish to see and click on "View".



4. Select the specific Lobbying Activity Report you wish to see and click on "View".

#### View Lobbying Activity Report on an Inactive Registration Return

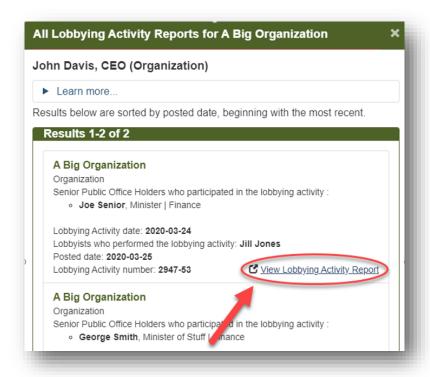
1. Inactive Registration Returns can be viewed via public search or through the Previous Registrations tab on your Designated Filer Dashboard.



- 2. Click on the last inactive version of the Registration Return to load it.
- 3. In the Registration Return, look for the section with the Associated Lobbying Activity Reports. Click on the **hyperlinked number** of Lobbying Activity Reports.



4. Locate the Lobbying Activity Report you wish to view and click "View Lobbying Activity Report".



#### **Print a Lobbying Activity Report**

1. Locate the Lobbying Activity Report that you wish to print and choose to view it.

See sections <u>View Lobbying Activity Report on a Current Registration Return</u> and <u>View Lobbying Activity Report on an Inactive Registration Return</u> for more information on locating and viewing the Lobbying Activity Report.

Once the Lobbying Activity Report is loaded on the screen, use your browser's print functionality. Usually this can be accessed via File > Print or by CTRL+P.

#### AMEND AND CANCEL A LOBBYING ACTIVITY REPORT

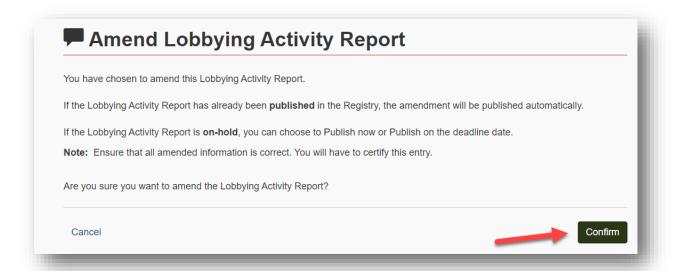
#### **Amend a Lobbying Activity Report**

- Go to the Lobbyists Registry sign in page <a href="https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn">https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn</a> and Sign in to your account.
- 2. Once signed in, you'll be on the Designated Filer Dashboard. Make sure you are on the "Current Registrations" tab.

3. Locate the Registration Return to which the Lobbying Activity Report belongs. Under the Lobbying Activity Reports section click "View All".



- 4. Locate the Lobbying Activity Report you wish to revise. Click "Amend" in the right-hand column.
- 5. Click "Confirm".



6. Proceed through the steps of the Lobbying Activity Report and update the information as required.

For information on completing a Lobbying Activity Report, see <u>Consultant Lobbyist – Monthly Returns and Lobbying Activity Reports</u> or <u>Organization – Monthly Returns and Lobbying Activity Reports</u>.

7. Once the information has been updated, certify that the information contained is true by ticking the **check box**.

Explain the reason for the amendment in the space provided.

- 8. If the Lobbying Activity Report is currently on hold, you can choose to publish it now or continue to have it on hold by selecting the appropriate **Lobbying Activity Report publishing option**.
- 9. Enter the Designated Filer's username and password and click "Certify".

#### **Cancel a Lobbying Activity Report**

If you have submitted a Lobbying Activity Report in error – if the lobbying activity never took place, or if it was recorded against the wrong Registration Return – you can cancel (delete) the report.

- 1. Go to the Lobbyists Registry sign in page <a href="https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn">https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn</a> and Sign in to your account.
- 2. Once signed in, you'll be on the Designated Filer Dashboard. Make sure you are on the "Current Registrations" tab.
- 3. Locate the Registration Return to which the Lobbying Activity Report belongs. Under the Lobbying Activity Reports section, click "View All".



- 4. Locate the Lobbying Activity Report you wish to cancel. Click "Cancel" in the right-hand column beside the correct Lobbying Activity Report.
- If you are certain this lobbying activity did not take place or you are not required to report it as a lobbying activity, confirm this by ticking the check box. Then enter a Reason for cancellation in the space provided.
- Enter the Designated Filer's username and password and click "Certify".
- 7. The Lobbying Activity Report will remain in your list but will be marked as "Cancelled" and will not be visible to the public.

# ADD CERTAIN INFORMATION TO YOUR REGISTRATION RETURN VIA A LOBBYING ACTIVITY REPORT

#### **Details Added via a Lobbying Activity Report**

It is possible to add new lobbying topics, public agencies being lobbied, and in-house lobbyists during the process of completing a Lobbying Activity Report. The information will be added to your Registration Return as an update, as of the date of the Lobbying Activity Report.

To complete the process, you must certify and submit the updated Registration Return to the Registry, on or before the deadline for Monthly Reports.

See <u>User Guide – Consultant Lobbyist Registrations</u> or <u>User Guide – Organization Registrations</u> for the steps to review and submit the updated Registration Return.

#### **GETTING HELP**

**GETTING STARTED - REFERENCE GUIDE** – start with this overview document.

#### Lobbyists Transparency Act, Regulation, and Frequently Asked Questions

<u>Lobbyists Transparency Act</u> (LTA) Lobbyists Transparency Regulation

LTA Guidance Documents

**Frequently Asked Questions** 

#### **Quick User Guides**

• Quick Reference Guide for Representatives

#### Full Length User Guides with screen captures

- User Guide Account Management
- User Guide Accounts and Registrations from the Previous Lobbyists Registry
- <u>User Guide Consultant Lobbyist Registration Returns</u>
- <u>User Guide Organization Registration Returns</u>

 <u>User Guide – Monthly Returns – Updates to Registration Returns and Lobbying Activity</u> <u>Reports</u>

#### **Contacting Registry Staff**

If you are not able to complete an update to your Registration Return or a Lobbying Activity Report, **email** our office at info@bcorl.ca

Describe the steps you have followed and the problem you have encountered. Include relevant screen captures to help us understand your issue and a **phone number** we can call if needed.

#### **Bulk Lobbying Activity Reports FAQs**

- 1. Is the bulk entry feature replacing the current Lobbying Activity Report creation method?
  - No. The bulk entry method is in an alternative to the single-entry Lobbying
     Activity Report creation method, so you will have the option to use either one.
- 2. Why would I use the bulk entry method over the single-entry Lobbying Activity Report creation method?
  - If you need to enter more than one Lobbying Activity Report, the bulk entry method will make it easier and faster to submit. Additionally, if you have similar Lobbying Activity Reports to submit, you can take advantage of the duplication feature, which allows you to copy an existing Lobbying Activity Report and then make modifications as required.
- 3. What happens if I enter Lobbying Activity Reports with the bulk entry method but do not certify them right away?
  - Uncertified Lobbying Activity Reports that are started with the bulk entry method will remain there until they are certified.
  - Additionally, you can access the uncertified Lobbying Activity Reports in the list of all Lobbying Activity Reports for your client or organization accessible from your Dashboard.
- 4. Once I certify a bulk entry, where can I see the Lobbying Activity Reports?
  - Once certified, you will continue to see the Lobbying Activity Report in the bulk listing screen till the end of that calendar day.
  - Additionally, you can always access all of your Lobbying Activity Reports in the list of all Lobbying Activity Reports for your client or organization accessible from your Dashboard, whether they were created using the bulk entry or single-entry method.

### 5. Can I leave incomplete Lobbying Activity Reports in the bulk entry system to finish later?

 Yes. Incomplete Lobbying Activity Reports will remain in the bulk entry listing to allow you to complete and certify at a later time.

### 6. I could not add a new In-house Lobbyist to a Lobbying Activity Report I created using the bulk entry method. Why?

- The bulk entry system does not allow you to add content that is not already in the underlying Registration Return. New content (such as a new In-house Lobbyist, Specific Topic of Lobbying Communication, new Ministries/Provincial Entities, etc.) must first be added to your underlying Registration Return, after which it will be accessible through the bulk entry method.
- By keeping your Registration Return up to date with the latest information, you should not need to add new information through the Lobbying Activity Report submission.

## 7. I could not add a new subject matter to a Lobbying Activity Report I created using the bulk entry method. Why?

- The bulk entry system does not allow you to add content that is not already in the underlying Registration Return. New content (such as a new In-house Lobbyist, Specific Topic of Lobbying Communication, new Ministries/Provincial Entities, etc.) must first be added to your underlying Registration Return, after which it will be accessible through the bulk entry method.
- By keeping your Registration Return up to date with the latest information, you should not need to add new information through the Lobbying Activity Report submission.

## 8. Can I amend a certified Lobbying Activity Report I added through the bulk entry system?

 No, but you can always access your Lobbying Activity Reports in list of all Lobbying Activity Reports for your client or organization accessible from your Dashboard and amend as required.

### 9. Can I cancel a certified Lobbying Activity Report I added through the bulk entry system?

 No, but you can always access your Lobbying Activity Reports in list of all Lobbying Activity Reports for your client or organization accessible from your Dashboard and cancel as required.