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Introduction

This manual will explain the filing requirements and provide step by step instructions for completing and filing electronic Lobbying Disclosure forms. It is available online from the Lobbying Disclosure website, and in printed form. It has a table of contents and a comprehensive index for you to locate specific functions you may need help with.

The online version of this manual is interactive and you can select how you want to locate information by using the tabs that are displayed at the top of the screen. The Table of Contents tab displays a list of sections on the left hand side of the screen. You can display the topics for each section by clicking the arrow displayed next to the section name. To collapse the list of topics, click the arrow again. The Index tab displays a list of topics on the left hand side of the screen in alphabetical order. When you click on a topic name, the information is displayed in the right hand panel.

A printable version of this manual is available in PDF format for easy printing: E-Filing Manual (PDF). The table of contents is located in the bookmark tab located to the left of your Adobe Reader screen, and the index is located at the very end of the document.

If you would like to view narrated presentations that demonstrate key functions of working with electronic forms and the e-filing process, click on the subject link listed below:

Getting Started
How to use electronic forms
Signing and submitting your forms to the House
Submitting your forms to the Senate

Where to Get Help

For information on the content that should be entered in Lobbying Disclosure form fields:

Review the appendices of this manual for line by line instructions for each form.

For general technical difficulties, such as installing the software or downloading forms:

Review the Troubleshooting Guide. Solutions to commonly reported problems will be listed in this section.

For help filing electronically with the Senate:

Senate Office of Public Records
232 Hart Senate Office Building
Washington, DC 20510
(202) 224-0758

For help with the forms or filing electronically with the House:

Legislative Resource Center
B-106 Cannon House Office Building
Washington, DC 20515
(202) 226-5200
Before contacting LRC, have the following information available:

- Registrant and client names, House ID;
- Computer operating system;
- Digital signature account number and password (if needed);
- Location of your forms;
- Error codes or messages that are displayed when you are working with your form. It is also helpful if you can make note of the specific steps you were doing when the error occurred.

**About ACES Digital Signatures**

In order to facilitate electronic filing with government agencies, the General Services Administration (GSA) has implemented the Access Certificates for Electronic Services (ACES) program. The Office of the Clerk has approved the use of ACES digital signatures on Lobbying Disclosure registrations and reports.

With handwritten signatures, a person who accepts a written signature on a check or important document may require identification and compare the signature on the identification document with the signature on the new document. Signing before a notary public gives a higher level of authentication because an official verifies the signer's identity. Both are processes of verifying identity.

Digital signatures are now accepted as the electronic equivalent of an individual's verified written signature because they combine a process and a technology of identity verification.

An individual who wants to use a digital signature applies for a digital signature certificate from a certificate authority (CA). The CA uses various means to verify the individual's identity -- the process component. The more thoroughly the CA verifies the identity of the individual, the higher the level of trust given to the digital signature.

The certificate authority creates an electronic signature and issues one part of the digital signature to the individual and stores the other part to allow electronic validation -- the technology component.

Digital signatures consist of a pair of separate secure encrypted data components known as the 'public key' and the 'private key'. The public key, or identity key, is held by a certificate authority, which may be an authorized private vendor or a public agency. The private key, or signature key, is stored on an individual's computer. When the individual who has access to the secure private key attaches it to a document and submits it to an agency, the private key is sent electronically to the certificate authority. If the public and private keys match, the signature is validated.

For agencies using the ACES program, the only certificate authorities that may issue ACES certificates are those authorized by GSA under the ACES contract as official ACES vendors.

The ACES program authorizes two types of certificates. They are:

- Transaction-based certificates, which are specific to one agency and require an agency code as part of the application; and
- Subscription-based certificates, which are purchased by an individual and may be used with any agency adopting a subscription-based digital signature filing program. The Office of the Clerk has adopted the subscription-based program for Lobbying Disclosure filing.

For more information on the GSA ACES Program, please visit [http://www.gsa.gov/aces/](http://www.gsa.gov/aces/)
General Filing Requirements

The topics listed below provide general guidelines about registering for and reporting lobbying activity with the U.S. House of Representatives and the U.S. Senate.

Filing Guidelines

Lobbying registrations and reports of income and expenses are filed with the Clerk of the House pursuant to the Lobbying Disclosure Act of 1995 (PL104-65), and its predecessor, the Legislative Reorganization Act (1946).

The Lobbying Disclosure Act of 1995, as amended (2 U.S.C. § 1601 et. seq.), requires lobbying firms and organizations to register and file reports of their lobbying activities with the Secretary of the U.S. Senate and the Clerk of the U.S. House of Representatives. E-Filing services are available to both new and existing registrants.

Form LD-1DS is used for initial registration under Section 4 of the Act (2 U.S.C. § 1603). Form LD-2DS is used for complying with the semiannual reporting requirements of Section 5 of the Act (2 U.S.C. § 1604).

Where to File Forms

Lobbying Registration (LD1-DS) and Lobbying Report (LD2-DS) forms must be filed with the offices listed below.

Clerk of the U.S. House of Representatives
Legislative Resource Center
B-106 Cannon House Office Building
Washington, DC 20515

Secretary of the U.S. Senate
Office of Public Records
232 Hart Senate Office Building
Washington, DC 20510

Registrants must file both forms electronically with the Office of the Clerk of the U.S. House of Representatives. Registrants may file new client registrations, amended registrations and activity report forms electronically with the Secretary of the U.S. Senate, but they do not accept new registrant registrations electronically; they must be filed on paper.

Review and Compliance

The Secretary of the U.S. Senate (Office of Public Records) and the Clerk of the U.S. House of Representatives (Legislative Resource Center) shall review, verify, and request corrections in writing to ensure the accuracy, completeness, and timeliness of registrations filed under the Act.

Whoever knowingly fails: (1) to correct a defective filing within 60 days after notice of such a defect by the Secretary of the U.S. Senate or the Clerk of the U.S. House of Representatives; or (2) to comply with any other provision of the Act, may be subject to a civil fine of not more than $50,000.
Public Availability

The Lobbying Disclosure Act of 1995 requires the Secretary of the U.S. Senate and the Clerk of the U.S. House of Representatives to make all registrations and reports available to the public as soon as practicable after they are received.

Filed reports are made available on public terminals up to the present. Reports from 1988-1995 filed under the Legislative Reorganization Act of 1946 are available on the terminals and on microfilm.

Lobbying Registration Requirements

Lobbying firms, (i.e., entities with one or more lobbyists), including self-employed individuals who act as lobbyists for outside clients, are required to file a separate registration for each client. Organizations employing in-house lobbyists file a single registration.

A lobbying firm is exempt from registration for a particular client if its total income from that client for lobbying activities does not exceed and is not expected to exceed $6,000 during a semiannual period. An organization employing in-house lobbyists is exempt from registration if its total expenses for lobbying activities do not exceed and are not expected to exceed $24,500 during a semiannual period.

Filing Deadlines

Registration is required no later than 45 days after a lobbyist first makes a lobbying contact or is employed or retained to make a lobbying contact.

Registration Amendments

A registrant must immediately file an amended Form LD-1DS: (1) if notified of a defect in the original filing by the Secretary of the U.S. Senate or the Clerk of the U.S. House of Representatives; or (2) if erroneously reported information is discovered by the registrant. Once registered, updated information (name and address changes, new lobbyists, new issue area codes, etc.) must be disclosed in the registrant's next semiannual report.

Terminating Registrants or Clients

A registrant terminates by submitting a completed LD-2DS report, indicating termination, no later than 45 days after the end of the reporting period in which it terminates.

Lobbying Activity Report Requirements

Active lobbying registrants must file a report for the semiannual period for which it initially registered and for each semiannual period thereafter, including the reporting period during which it terminates. Lobbying firms, (i.e., entities with one or more lobbyists, including self-employed individuals who act as lobbyists for outside clients), are required to file a separate report for each client covered by a registration. Organizations employing in-house lobbyists file a single report for each semiannual period.

Filing Deadlines

The semiannual report is required to be filed no later than 45 days after the end of a semiannual period beginning on the first day of January and the first day of July of every year in which a registrant is registered. The filing deadlines for lobbying reports are:
• August 14 or the next business day for January 1 – June 30 mid-year reports;
• February 14 or the next business day for July 1 - December 31 year-end reports.

**Activity Report Amendments**

A registrant must immediately file an amended Form LD-2DS: (1) if notified of a defect in the original filing by the Secretary of the U.S. Senate or the Clerk of the U.S. House of Representatives; or (2) if erroneously reported information is discovered by the registrant. Once registered, updated information (name and address changes, new lobbyists, new issue area codes, etc.) must be disclosed in the registrant's semiannual report.
Getting Started

The topics listed below explain the requirements to file Lobbying Disclosure forms electronically. Please review each section carefully before you begin working with the forms to ensure that your computer is configured correctly to file Lobbying Disclosure forms electronically.

Decide Which Computer Will Be Used

The Lobbying Disclosure Electronic Filing System requires that an ACES digital signature be obtained and installed on the computer from which the filings will be submitted. It is important to decide who will sign the filings, and then select the appropriate computer for installation of that digital signature. The Legislative Resource Center accepts the signature of any person approved by the registrant to sign registration and reporting forms.

The computer to be used for form preparation and filing must have:

- A web browser (Internet Explorer version 5.0 or higher, Netscape version 7.0 or higher, or Firefox version 1.0 or higher);
- System configuration sufficient to run the IBM Workplace Form software;
- IBM Workplace Forms version 2.5, and;
- An internet connection.

It is possible to download and prepare a form at one computer, save it to a network folder or send it to another person, then sign, save and submit the form from a second location if the IBM Workplace software is installed.

See IBM Workplace Viewer System Requirements for more information

Obtain an ACES Digital Signature Certificate

The ACES Digital Signature program is a GSA initiative to assist in implementation of electronic filing with federal government agencies. The ACES digital signature certificate is the only type accepted by the Legislative Resource Center for Lobbying Disclosure filings.

Several ACES vendors provide digital signature certificates for the Lobbying Disclosure Electronic Filing System. You may obtain an ACES digital signature certificate for lobbying disclosure filings from the vendors listed below:

IdenTrust (Formerly, Digital Signature Trust)  
IdenTrust\DST ACES certificate center  

Operational Research Consultants, Inc.  
US Government Access Certificates for Electronic Services

When you have selected a vendor, follow the vendor instructions to apply for a certificate. Once your application has been approved, follow the vendor instructions to download and install the certificate.

NOTE: Processing your application can take as little as 2 - 4 days. However, due to the identity and verification requirements, the entire process (from application to receipt of the ACES digital signature certificate) can take as long as 1 to 2 weeks.
**Maintaining Digital Signatures**

It is recommended that you create a backup of your signature after it’s installed. If you have problems with your computer, or need to move the signature to another computer, you can use the backup copy to re-install it without installing it from the vendor site again.

Instructions on how to backup and install your digital signature are located on each vendor’s help pages.

See [http://lobbyingdisclosure.house.gov/contact.html](http://lobbyingdisclosure.house.gov/contact.html) for a list of vendor support sites.

---

**Create a Form Folder and Naming Convention**

To ensure that you can easily locate your forms, it is recommended that you create a specific folder to store your forms and a naming convention for them before you begin. The following suggestions may assist you in determining the best way to manage your forms:

- Do not store your forms on your desktop. Store them in a single folder so you can easily locate your forms;
  Most browsers automatically select the **My Documents** folder when the document is saved. Using this folder will make your forms easy to locate. It is recommended that you consult your IT Support Staff (if available) for additional information on choosing the right location to store your forms;
- Create a naming convention to help you distinguish between templates, completed, and signed forms;
- Use **Lobbying Disclosure Forms** as the primary folder name for storing forms;
  Pre-populated forms are already named using the client ID. It is recommended that you save the template as **Filingperiod_clientname** before you edit it;
- Download the forms from the Lobbying Disclosure website instead of opening them in a browser.

---

**Install the IBM Workplace Viewer**

The IBM Workplace Viewer software is required to work with Lobbying Disclosure forms. Once it is installed on your computer it is available from the Start menu. It also runs in Internet Explorer if you are creating a new form from the Lobbying Disclosure website. You can download and install the application from the Lobbying Disclosure website, or use the installation CD that was mailed to each active registrant.

To install the IBM Workplace Viewer application:
• If you are installing from CD:
  Insert the installation CD in the appropriate drive of your computer;

A browser window is displayed displaying links to the installation, help files, and forms;
Click on the link to install IBM Workplace Viewer;

A registration page is displayed;
• If you are installing from the Lobbying Disclosure website:
  Go to the **Forms and Software** page on the Lobbying Disclosure website and click on the link to install IBM Workplace Viewer;
• Enter your registrant name and email address in the appropriate fields and click the **Download** button:

*Note: You might experience a pause before the installation window appears.*

A window is displayed asking if you want to install the IBM Workplace Viewer;

• Click the **Yes** button:

The installation files are extracted and a window is displayed;

• Click the **Next** button:

The default installation path is displayed. It is recommended that you do not change these settings;
• Click the **Next** button:

![Setup screenshot](image1)

The setup folder settings are displayed. It is recommended that you do not change these settings;

• Click the **Next** button to begin the installation:

![Setup screenshot](image2)

When the installation is complete a window is displayed;

• Uncheck the **Launch the application** box;
• Click the **Finish** button to close this window.

The IBM Workplace Viewer is now installed on your computer.
Download Forms

You can download blank forms to register for the first time, or pre-populated forms for each registered client, from the Lobbying Disclosure website.

To download blank forms:

- Go to the Windows section of the Lobbying Disclosure website;
- Click the Register or Reporting tab;
  The appropriate form is available in the Forms section of each page;
- Click on the form icon you want to download:

  ![File Download Window]

  A window is displayed asking you if you want to open or save the file;
- Click the Save button;

  ![Save As Window]

  A window is displayed that allows you to navigate to the location where you want to store your form;
- Modify the form name, if needed, and click the Save button. Your form is now downloaded and available for use.

Note: You can open a form for editing by double-clicking on the file name, by clicking the Open button in the IBM Workplace Viewer toolbar. Do not try to open the forms using other applications such as MS Word or Corel WordPerfect.
To download pre-populated templates:

- Go to the Windows section of the Clerk’s Lobbying Disclosure website;
- Click on the **Forms and Software** tab;

  ![Download Template Forms](image)

- Enter the registrant name in the **Download Template Forms** section and click the **Search** button:

  ![Download Template Forms](image)

  A list of client names, House ID’s, and a link to download new client registrations and reports for each client are displayed. If you have more than 5 clients, a link to the zip file with all client templates is also displayed;

- Click on the form icon you want to download;

  ![File Download](image)

  A window is displayed asking you if you want to open or save the file;
• Click the **Save** button;

![Save window](image)

A window is displayed that allows you to navigate to the location where you want to store your form;

• Modify the form name, if needed, and click the **Save** button. Your form is now downloaded and available for use;

• If you have downloaded the zipped forms, right click on the zipped file and select **Extract All** after it has been downloaded;

  A window is displayed that allows you to navigate to the location where you want to store your forms. Pre-populated forms will be extracted and named using the House ID for each client. Your forms are now saved in your Lobbying Disclosure folder and ready to be used.

*Note*: You can open a form for editing by double-clicking on the file name, or by clicking the **Open** button in the **IBM Workplace Viewer** toolbar. Do not try to open the forms using other applications such as MS Word or Corel WordPerfect.
Understanding Electronic Filing

The topics below explain the House electronic filing process and provide examples of responses you will receive from the system when you file.

Overview of the House Filing Process

Lobbyists file Lobbying Disclosure Registrations and Reports with the Office of the Clerk by downloading the forms from the Lobbying Disclosure website, completing the appropriate fields in the form, signing each form with an ACES digital signature and submitting them to the Legislative Resource Center.

If the filer has a Senate ID and password, completed Lobbying Reports and New Client Registrations can be filed electronically with the Senate. Forms can also be printed and submitted to the Senate on paper.

Submitting Forms

Each time a form is submitted electronically to the Office of the Clerk, a message is displayed in the browser that tells you if your submission was successful or not.

- If the filing was received successfully, the message includes a confirmation number, the registrant and client name, and the date and time the form is received;
- If the form was not received successfully, a failed message may be displayed depending on the problem with your submission;

See the Troubleshooting Guide for more information

After you have submitted your form, it is processed. Messages will be sent to the point of contact email address listed on the form regarding the status of your filing.
Processing Forms

After the form has been received it is checked to verify that the form has not been altered since it was signed. When the form is valid, a process extracts the signature and sends it to the ACES certificate authority for authentication:

- If the filing fails due to a specific problem with your signature, such as the signature being revoked or suspended:

  A message is sent with the specific problem that was returned by the certificate authority. You must contact your certificate authority to correct the problem. You can sign and re-file your form when the issue is resolved.

When the document integrity and the signature are valid, the registration information in your form is compared with existing records in the database:

- If the House ID, Registrant, and Client names match:
Your filing is approved automatically and available to the public. A message is sent that the filing was successful;

- If the Registrant Name, Client Name or House ID does not match existing records on file:

The filing is considered pending and a message is sent that filing is pending review by the records and registration staff.

When the filing has been reviewed a message is sent with the results:

- If your filing is approved after the review:

It is made available to the public and a message is sent that the filing was approved;
If the filing is rejected after the review:

A message is sent that the filing has been rejected. Please read the instructions in this message carefully. You must update your completed form and file it again.

Note: You can avoid rejected filings by using the pre-populated IBM Workplace forms.
House ID Numbers

When a new lobbying firm, or individual, registers with the House, a unique ID is created for that registrant. Each time a new client is registered for that registrant, a sequential 4 digit number is created and combined with the registrant ID to create the House ID for that client, as shown in the example below:

<table>
<thead>
<tr>
<th>Complete House ID Number:</th>
<th>12345</th>
<th>6789</th>
</tr>
</thead>
<tbody>
<tr>
<td>(9 digits)</td>
<td>Registrant ID (First 5)</td>
<td>Client ID (Last 4)</td>
</tr>
</tbody>
</table>

For example, lobbying registrant K Street Incorporated has three clients: Constitution Group, Independence Group, and Democracy Group. K Street Incorporated’s House ID numbers are as follows:

<table>
<thead>
<tr>
<th>Registrant Name: K Street Incorporated</th>
<th>12345</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Client Name:</strong></td>
<td><strong>House ID:</strong></td>
</tr>
<tr>
<td>Constitution Group</td>
<td>123450000</td>
</tr>
<tr>
<td>Independence Group</td>
<td>123450001</td>
</tr>
<tr>
<td>Democracy Group</td>
<td>123450002</td>
</tr>
</tbody>
</table>

Notice that the first 5 digits in this example remain the same, since all three clients are registered for the same lobbying firm. When you register a new client, you will use the first 5 digits, which is the registrant portion of your House ID. When you file a lobbying activity report, you will use the full 9 digit House ID for each client.
Working with Forms

The Lobbying Disclosure Electronic Filing System allows filers to complete Lobbying Disclosure Registration and Reporting forms using the IBM Workplace Viewer. These forms are opened on the filer’s computer and completed, signed with an authorized ACES digital signature certificate, and then submitted to the House. The electronic forms have the following features:

- Blank forms can be downloaded from the Lobbying Disclosure website for first time registrants. If you are already registered, you can download registration and reporting templates that are pre-populated with the House ID and registrant information for each client;
- As you complete the forms you can add and delete new issue, addendum, and update pages when needed. You can also navigate to any page in the form;
- Form data is validated for compliance with filing requirements and alerts you about problems that must be corrected before the form can be filed;
- The process to prepare your form for filing has been simplified. Signatures can now be removed from your forms, and edited, without corrupting the form;
- Forms can now be submitted to both the House and Senate from your desktop using any internet connection;
- The user manual can be accessed from the header in each form page should you need help while completing the form.

The topics listed below explain the features and functions of the Lobbying Disclosure electronic forms and step by step instructions on how to complete forms and use form templates.

Form Features

It is recommended that you become familiar with these functions before you begin working with them. Understanding how they perform will help you avoid commonly reported problems.
Form Navigation
A toolbar is available at the top of the application window that allows you to:

- Open an existing form;
- Save the form, or save it with a new name;
- Print or e-mail the form;
- Check the spelling on all pages, and;
- Zoom in and out of the form.

**NOTE:** A preferences button is also available on this toolbar, but we recommend that you DO NOT ALTER the default settings.

A header section is available at the top of your form that allows you to:

- Move to the next or previous page;
- Jump from one page to another;
- Access the Help manual located on the Lobbying Disclosure website;
- Delete the page that is displayed, and;
- Import data into your form.

**NOTE:** The Import XML button only appears if you have installed the import tool.

Function Buttons
As you work with the forms, function buttons are available in the appropriate locations that allow you to:

- Add new issue pages on the LD2 form;
• Add addendum pages for issue descriptions on the LD2 form;

[Table]

<table>
<thead>
<tr>
<th>Name</th>
<th>Covered Official Position (if applicable)</th>
<th>New</th>
</tr>
</thead>
</table>

• Add addendum pages for lobbyists on the LD2 form;

[Image: Add Add/Seq/Update Page ->]

• Add update pages to the LD1 and LD2 form;

[Signature: [Click here to digitally sign this form]]

• Sign the forms, and;

[Image: Senate Password: File With House: Submit]

• Submit the form to the House and Senate.

**Entering Form Content**

Information must be entered in the fields using the proper format before you can sign or submit them. The formatting types are:

• **List Fields**

[Image: 4a. Contact Name]

Values can be selected from a list by clicking the down arrow and left clicking on a value;

*Note: You can deselect a value by clicking the blank space in the list menu if you are editing a previously filed form.*

• **Check Boxes**

[Image: 8. Year: 2005, Midyear (January 1 - June 30), Year End (July 1 - December 31)]

Option boxes can be selected by left clicking on the box;
• **Date Fields**

Dates can be entered by manually typing it in or by clicking the down arrow and selecting it from a calendar screen. All typed dates must be entered as MM/DD/YYYY;

• **Currency Fields**

Expenses must be entered as numbers and are automatically formatted as currency. You can enter whole numbers, or dollars and cents;

The entry is formatted when you move the cursor to the next field, as shown in the example above;

• **Text Fields**

All other form fields are text. You can enter information by typing it in or copying and pasting it from other electronic sources. You can create multiple line entries by pressing the enter key at the end of a sentence. You can also enter text in a single line, using comma, dashes, and spaces so the content is readable. There are no requirements for how the text is formatted.

*Note: Each text field does have a space requirement. If you have entered too much text in a field, it will turn red when you move to the next field. You must edit the text to fit in the field or move the additional text to an addendum page.*

• **Required Fields**

Required fields are highlighted in yellow;
If a field contains the wrong type of entry, the color is changed to red:

You can view more information on how to correct the problem by holding your cursor over the field:

When the entry is corrected, the field color is changed to white.

**Shortcuts**

Keystrokes can be used to move your cursor through the form, and to use functions, such as open, without using the mouse buttons.

<table>
<thead>
<tr>
<th>Keystroke</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alt + space</td>
<td>Opens the context menu so that you can resize or close the Viewer's window</td>
</tr>
<tr>
<td>Ctrl + O</td>
<td>Displays the Windows Explorer window so that you can open a form</td>
</tr>
<tr>
<td>Ctrl + S</td>
<td>Saves the form</td>
</tr>
<tr>
<td>Ctrl + Alt + S</td>
<td>Displays the Windows Explorer window so that you can save the form with a new name</td>
</tr>
<tr>
<td>Ctrl + P</td>
<td>Prints the form</td>
</tr>
<tr>
<td>Ctrl + Shift +</td>
<td>Increases the zoom</td>
</tr>
<tr>
<td>Ctrl + -</td>
<td>Decreases the zoom</td>
</tr>
<tr>
<td>Tab</td>
<td>Moves the cursor forward to the next form field</td>
</tr>
<tr>
<td>Shift + tab</td>
<td>Moves the cursor backwards to the previous form field</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Keystroke</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Left, Right Arrow</td>
<td>Moves the cursor between letters in a field</td>
</tr>
<tr>
<td>Up, Down Arrow</td>
<td>The down arrow key displays a list of choices in a popup or combo box. When the list is displayed the up and down arrow keys move the cursor through the list</td>
</tr>
<tr>
<td>Space Bar</td>
<td>Activates buttons and selects the current choice in a list and closes it</td>
</tr>
<tr>
<td>Alt + F7</td>
<td>Spell checks a selected item</td>
</tr>
<tr>
<td>Shift + F7</td>
<td>Spell checks the current page of the form</td>
</tr>
<tr>
<td>Ctrl + A</td>
<td>Selects all the text in a field</td>
</tr>
<tr>
<td>Ctrl + X</td>
<td>Cuts selected text from a text field</td>
</tr>
<tr>
<td>Ctrl + C</td>
<td>Copies selected text from a text field</td>
</tr>
<tr>
<td>Ctrl + V</td>
<td>Pastes copied or cut text into a text field</td>
</tr>
</tbody>
</table>
Using Templates and Populated Forms

You can create and reuse form templates that contain data that does not change frequently. This will eliminate the need to re-enter the same data each time you complete a new form for filings. Using templates will help you avoid common filing problems, such as wrong House ID numbers or misspelled registrant or client names. It is recommended that you use the pre-populated forms for each client that are available on the Lobbying Disclosure website.

See Download Forms for more information on how to obtain pre-populated templates

Creating Templates

To create a template:

- Open the form in **IBM Workplace Viewer** and complete the fields in section one;

- Click the **Save as** button on the toolbar, or press **Ctrl+Alt+S**:

  ![IBM Workplace Viewer](image)

  Windows Explorer is displayed;

  - Navigate to the folder where you are storing your Lobbying Disclosure forms;
  - Enter a form name in the **File Name** field using the appropriate naming convention;
  - Click the **Save** button, or press **Ctrl+S**:

    Your form is now saved and available to use for future filings.

*Note: You can open a form for editing by double-clicking on the file name, by clicking the **Open** button in the **IBM Workplace Viewer** toolbar. Do not try to open the forms using other applications such as MS Word or Corel WordPerfect.*

See Create a Form Folder and Naming Convention for more information
Using Templates

To use a template to create a new filing:

- Navigate to the folder where your forms are stored and double click on the template name you want to use;
  The template will be opened in IBM Workplace Forms;

![Lobbying Disclosure Report Form](image)

Note: You can open a form from IBM Workplace Viewer by clicking the Open button in the toolbar or pressing Ctrl+O. Do not try to open the forms using other applications such as MS Word or Corel WordPerfect.

- Click the Save as button on the toolbar, or press Ctrl+Alt+S:

![Save Form Dialog Box](image)

Windows Explorer is displayed. Navigate to the folder where you are storing your Lobbying Disclosure forms;

- Enter a form name in the File Name field using the appropriate naming convention, and click the Save button:
  Your form is now saved with a new name and ready to be completed for a new filing.

NOTE: It is important to perform these steps BEFORE you begin working with the form to ensure the template does not get altered.
Re-Using Signed Forms

It is possible to use previously filed forms for new filings, such as amendments to an original filing, by deleting the signature and modifying the content.

**NOTE:** *It is important to remember to save the form with a new name before you modify it or you will overwrite the original form.*

To re-use a form:

- Navigate to the folder where your forms are stored, click on the form name, and press the **Open** button. The form will be opened automatically in **IBM Workplace Viewer** and Page 1 will be displayed;
- Click on the **Signature** field;
- The **Digital Signature Viewer** window is displayed. Click the **Delete** button;
- The signature is removed from the form. Click the **OK** button;
- Click the **Save As** button on the **IBM Workplace Viewer** toolbar; Windows Explorer is displayed;
Navigate to the folder where you are storing your Lobbying Disclosure forms, enter a form name in the **File Name** field using the appropriate naming convention, and click the **Save** button:

Your form is now saved with a new name and ready to be edited.
Completing Forms

To avoid the most commonly reported problems, it is recommended that you adhere to the guidelines listed below when you work with Lobbying Disclosure forms:

- Forms can be completed manually by completing the fields on each page, or by importing the data using an XML data source. The import tool is designed for populating large forms by IT professionals familiar with using XML files;
- New issue, update and addendum pages can be added and deleted at any time while you are working on the form using the appropriate buttons located on the form;
- The form is validated when you sign the document. A message will be displayed if required fields in your form are not completed. You must review any messages that appear and correct your form before you can sign and file it;
- When you save the form you will be reminded if there are required fields in the form that are incomplete.

Completing Form Fields

To complete your forms manually:

- Navigate to the folder where your forms are stored, click on the form name, and press the **Open** button. The form will be opened automatically in IBM Workplace Viewer and Page 1 will be displayed;
- If you are using a form template, it is recommended that you click the **Save As** button on the toolbar and give the form a new name according to your naming convention. This will ensure that your template can be easily used for other filings;
- Press the **Tab** key, or click on the field with your mouse, to move your cursor to the first field on the form and enter the appropriate information;
- When page 1 is complete, use the navigation buttons in the form header to advance to the next page. Repeat these steps until all pages in the form are complete. You may add new pages as needed to complete your form using the appropriate buttons on each page. You can also jump to any page in the form using the navigation buttons in the form header;
- When your form is complete, press the **Save** button on the **IBM Workplace Viewer** toolbar;

Your form is now ready to be signed and submitted to the House and Senate.

See Appendices for line by line instructions to complete the LD1 and LD2 forms
Importing Form Content

If you are using a database to track your lobbying activity, you can export the information from your database as XML and import it directly into a lobbying disclosure form. This tool is designed for lobbying firms that are currently using a database with technical support that is familiar with using XML files. A sample MS Access database has been created to give you a working example of how to export your data into an XML import file.

See Import Tool in the Appendices for downloads and the XML schema.

To install the Import Tool:

- Download the ushrIFX.ifx file and copy it to the C:\Program Files\IBM\Workplace\Forms\Viewer\2.5\extensions folder;
- Open a blank form in IBM Workplace viewer;
  The Import XML button will appear in the left hand side of the form header.

To populate your forms using an XML data source:

- Prepare your XML Import file according to the appropriate XML schema and the following guidelines;
- Open the blank LD1 or LD2 form in the IBM Workplace Viewer;
- Click the Import XML button:

  ![Import XML button](image)

  A window is displayed to select your XML import file;
- Select the XML file you want to import and click the Open button. The form screen will be displayed as the form is being built. The length of time to import your file will vary depending on the number of pages your form will contain;
- If the XML import file was not formatted properly:

  ![Import XML error](image)
A message is displayed that your file contains invalid data and lists the specific elements that are invalid according to the schema;

- Click the Ok button, fix the formatting in your import file, and click the Import XML button on the form again;
- If the import was successful:

![Import process complete](image)

- A message is displayed that the import completed;
- Click the OK button:

Your completed form has been created. If the fields on the first page are not displayed, navigate to any other page on the form and go back to page 1. The fields will show as populated;

- Review each page in the form to ensure that all fields are valid. If a field contains invalid data, it is shown in pink. You must correct the entries before you can sign and file your form.
Signing and Filing Forms

The topics listed below provide step by step instructions on how to file your Lobbying Disclosure forms with the House and the Senate. To file your Lobbying Disclosure forms with the House you must have an ACES digital signature, a browser, and an internet connection. If you are filing electronically with the Senate, you must also have a Senate password.

Separate instructions to file with the House or Senate are listed below. You can use a completed Lobbying Disclosure form to file with both the House and the Senate, but the electronic filing process for each Chamber must be executed separately at this time.

Signing and Filing Forms with the House

When your form is complete, it is ready to be signed and submitted.

To sign your form:

- Click on the form Signature field;
- A validation process is run that checks all required entries for completed:

If any field on your form is not valid or is incomplete, a message will be displayed. Please review this message carefully and click the OK button. You must go through the form and correct the invalid fields or complete the required fields;

- When the form passes validation, the Digital Signature Viewer window is displayed;
• Click on the **Sign** button;

This message is displayed if you do not have a valid ACES digital signature certificate installed. You must purchase an ACES digital signature to sign and submit your forms with the House. If you have purchased one, it may not be installed correctly. Contact the vendor you purchased the certificate from to resolve the problem;

A list is displayed if you have more than one ACES digital signature installed on your computer. Click on the name of the signature you want to use and click the **OK** button;
A password confirmation window is displayed if your certificate security level is set to high. Enter your password and click the OK button;

![Digital Signature Viewer]

The ACES digital signature certificate that is loaded on your computer is displayed;

- Click the Ok button:
  The signature and sign date are inserted and the form fields are locked;

![Digitally Signed By James R. Layden]

**Note:** Filing with either chamber is two steps; you must first select which chamber you are filing with, as shown above, and then click the Submit button.

- Select the option to File with House, if not already selected, and then click the Submit button;

![Lobbying Disclosure Electronic Filing System]

When your form has been submitted a browser window will be displayed with a status message. If the filing was received successfully, the message will include a confirmation number, the registrant and client name, and the date and time the form is received. If the form was not received successfully, a failed message may or may not be displayed depending on the problem with your submission.

After you have submitted your form, it is processed. Messages will be sent to the point of contact email address listed on the form regarding the status of your filing.

See Understanding Electronic Filing for more information
Filing Forms with the Senate

To file your form with the Senate:

- Open the form you want to file, if it is not already opened in IBM Workplace Viewer;
- Navigate to the end of page 2 on the LD1 form, or the end of page 1 on the LD2 form;
- Select File with Senate and enter your Senate password;

*Note:* The House and Senate filing process are independent of each other and you do not have to remove the digital signature from your form to file with the Senate.
- Press the Submit button:

A Filing Verification screen is displayed in a browser window;

- Click the button to Officially File your document with the Senate:

When the filing has been received the web page is updated with a confirmation number.

Contact the [Senate Office of Public Records](https://www.senate.gov) if you have questions about your filing.
Appendices

Listed below are detailed instructions to help you enter information correctly on your Lobbying Disclosure Forms.

### Lobbying Issue Codes

The lobbying issue codes listed below can be selected using pull down lists for issue codes on the LD1 and LD2 forms.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACC</td>
<td>Accounting</td>
<td>HOM</td>
<td>Homeland Security</td>
</tr>
<tr>
<td>ADV</td>
<td>Advertising</td>
<td>HOU</td>
<td>Housing</td>
</tr>
<tr>
<td>AER</td>
<td>Aerospace</td>
<td>IMM</td>
<td>Immigration</td>
</tr>
<tr>
<td>AGR</td>
<td>Agriculture</td>
<td>IND</td>
<td>Indian/Native American Affairs</td>
</tr>
<tr>
<td>ALC</td>
<td>Alcohol &amp; Drug Abuse</td>
<td>INS</td>
<td>Insurance</td>
</tr>
<tr>
<td>ANI</td>
<td>Animals</td>
<td>LBR</td>
<td>Labor Issues/Antitrust/Workplace</td>
</tr>
<tr>
<td>APP</td>
<td>Apparel/Clothing Industry/Textiles</td>
<td>LAW</td>
<td>Law Enforcement/Crime/Criminal Justice</td>
</tr>
<tr>
<td>ART</td>
<td>Arts/Entertainment</td>
<td>MAN</td>
<td>Manufacturing</td>
</tr>
<tr>
<td>AUT</td>
<td>Automotive Industry</td>
<td>MAR</td>
<td>Marine/Maritime/Boating/Fisheries</td>
</tr>
<tr>
<td>AVI</td>
<td>Aviation/Aircraft/Airlines</td>
<td>MIA</td>
<td>Media (Information/Publishing)</td>
</tr>
<tr>
<td>BAN</td>
<td>Bankruptcy</td>
<td>MED</td>
<td>Medical/Disease Research/Clinical Labs</td>
</tr>
<tr>
<td>BNK</td>
<td>Banking</td>
<td>MMM</td>
<td>Medicare/Medicaid</td>
</tr>
<tr>
<td>BEV</td>
<td>Beverage Industry</td>
<td>MON</td>
<td>Minting/Money/Gold Standard</td>
</tr>
<tr>
<td>BUD</td>
<td>Budget/Appropriations</td>
<td>NAT</td>
<td>Natural Resources</td>
</tr>
<tr>
<td>CHM</td>
<td>Chemicals/Chemical Industry</td>
<td>PHA</td>
<td>Pharmacy</td>
</tr>
<tr>
<td>CIV</td>
<td>Civil Rights/Civil Liberties</td>
<td>POS</td>
<td>Postal</td>
</tr>
<tr>
<td>CAW</td>
<td>Clean Air &amp; Water (Quality)</td>
<td>RRR</td>
<td>Railroads</td>
</tr>
<tr>
<td>CDT</td>
<td>Commodities (Big Ticket)</td>
<td>RES</td>
<td>Real Estate/Land Use/Conservation</td>
</tr>
<tr>
<td>COM</td>
<td>Communications/Broadcasting/Radio/TV</td>
<td>REL</td>
<td>Religion</td>
</tr>
<tr>
<td>CPI</td>
<td>Computer Industry</td>
<td>RET</td>
<td>Retirement</td>
</tr>
<tr>
<td>CSP</td>
<td>Consumer Issues/Safety/Protection</td>
<td>ROD</td>
<td>Roads/Highway</td>
</tr>
<tr>
<td>CON</td>
<td>Constitution</td>
<td>SCI</td>
<td>Science/Technology</td>
</tr>
<tr>
<td>CPT</td>
<td>Copyright/Patent/Trademark</td>
<td>SMB</td>
<td>Small Business</td>
</tr>
<tr>
<td>DEF</td>
<td>Defense</td>
<td>SPO</td>
<td>Sports/Athletics</td>
</tr>
<tr>
<td>DOC</td>
<td>District of Columbia</td>
<td>TAX</td>
<td>Taxation/Internal Revenue Code</td>
</tr>
<tr>
<td>DIS</td>
<td>Disaster Planning/Emergencies</td>
<td>TEC</td>
<td>Telecommunications</td>
</tr>
<tr>
<td>ECN</td>
<td>Economics/Economic Development</td>
<td>TOB</td>
<td>Tobacco</td>
</tr>
<tr>
<td>EDU</td>
<td>Education</td>
<td>TOR</td>
<td>Torts</td>
</tr>
<tr>
<td>ENG</td>
<td>Energy/Nuclear</td>
<td>TRD</td>
<td>Trade (Domestic &amp; Foreign)</td>
</tr>
<tr>
<td>ENV</td>
<td>Environmental/Superfund</td>
<td>TRA</td>
<td>Transportation</td>
</tr>
<tr>
<td>FAM</td>
<td>Family Issues/Abortion/Adoption</td>
<td>TOU</td>
<td>Travel/Tourism</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
<td>Code</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>----------------------------------</td>
<td>------</td>
<td>------------------------------------</td>
</tr>
<tr>
<td>FIR</td>
<td>Firearms/Guns/Ammunition</td>
<td>TRU</td>
<td>Trucking/Shipping</td>
</tr>
<tr>
<td>FIN</td>
<td>Financial Institutions/Investments/Securities</td>
<td>URB</td>
<td>Urban Development/Municipalities</td>
</tr>
<tr>
<td>FOO</td>
<td>Food Industry (Safety, Labeling, etc.)</td>
<td>UNM</td>
<td>Unemployment</td>
</tr>
<tr>
<td>FOR</td>
<td>Foreign Relations</td>
<td>UTI</td>
<td>Utilities</td>
</tr>
<tr>
<td>FUE</td>
<td>Fuel/Gas/Oil</td>
<td>VET</td>
<td>Veterans</td>
</tr>
<tr>
<td>GAM</td>
<td>Gaming/Gambling/Casino</td>
<td>WAS</td>
<td>Waste (hazardous/solid/interstate/nuclear)</td>
</tr>
<tr>
<td>GOV</td>
<td>Government Issues</td>
<td>WEL</td>
<td>Welfare</td>
</tr>
<tr>
<td>HCR</td>
<td>Health Issues</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
LD1 Instructions

REGISTRATION TYPE: Select one. This selection will not appear on the final printed form.

- New Registrant -- If the registrant is NOT registered with the Office of the Clerk for any lobbying, check 'New Registrant'. A second question will appear if you check 'New'. If you ever registered for lobbying disclosure in the past but terminated that registration, please check yes.
- New Client -- If the registrant has an existing registration but wishes to add a new client, click 'New Client'.
- Amendment -- If the registrant is amending information relating to this specific registration, check amendment. Please note that the amendment is only for the client specified.

LINE 1. EFFECTIVE DATE OF REGISTRATION: Enter the date that the registrant is retained by the client or first makes a lobbying contact, whichever is earlier. If the effective date is prior to the end of a semiannual reporting period, a lobbying report must be filed detailing the activity for that semiannual period. Enter the date in mm/dd/yyyy format. It is not necessary to put '0' in front of a single digit day or month.

LINE 2. HOUSE IDENTIFICATION NUMBER: The number to be placed in the House ID field depends on the filing type:

- New Registrant -- Leave this line blank if this is an initial registration. The House ID will be assigned by the Legislative Resource Center after the registration is processed and will be unique to each registrant-client relationship. After being notified of this number, use it in all correspondence pertaining to this relationship.
- New Client -- Locate the House ID number for a registration you have previously filed. The first five digits of the House ID for that registration represents your registrant identification. Enter those five digits. Example: A registrant's House ID for an existing client is 32345004. To add a new client, the registrant will enter 32345, the first five digits that identify the registrant. This number is required to complete the filing.
- Amendment -- Enter the eight-digit number for the specific registration to be amended. This number is required to complete the filing.

LINE 2. SENATE IDENTIFICATION NUMBER: If a Senate Identification number has been assigned for this registrant-client registration, please enter it here. If not, the Office of Public Records will assign this number.

LINE 3. REGISTRANT NAME AND ADDRESS: NAME: If the registrant is a lobbying firm or an organization employing in-house lobbyists, enter the full legal name. If the registrant is a self-employed lobbyist, click 'Individual' to switch to name fields, then select the preferred prefix and enter the first name and last name. If you wish, you may enter a middle name with the first name or a suffix with the last name. For future electronic filing, it is important to enter the name exactly the same each time.

ADDRESS: Enter the mailing address to which correspondence should be addressed. A US mailing address and contact information is preferred. A full address is required to complete the filing.

LINE 4. PRINCIPAL PLACE OF BUSINESS: Indicate the city, state and country of the registrant's principal place of business, if different from the address on line 3.

LINE 5. TELEPHONE NUMBER, CONTACT NAME AND E-MAIL: Enter the telephone number, including area code. Please use the (222)222-2222 or 222-222-2222 format. A US telephone number is preferred. Select the preferred prefix (Mr., Ms. Mrs.), and enter the full name of the person to contact for any questions concerning the registration. Enter the contact e-mail address. A telephone number, contact name and e-mail address in valid format are required to complete the filing.

LINE 6. GENERAL DESCRIPTION OF REGISTRANT'S BUSINESS OR ACTIVITIES: Provide a general description of the registrant's business or activities, e.g. "manufacturing," "computer software developer," "law firm," "public relations firm," "self-employed public affairs consultant," "social welfare organization," etc. The business description is required to complete the filing.
LINE 7. CLIENT NAME AND ADDRESS: For an organization lobbying on its own behalf, check the box labeled 'SELF'. When 'Self' is checked, the registrant name is inserted in the client name line. The client address, principal office address and business activity are 'skipped' and the focus moves to Line 10. An error message will be given on an attempt to enter information in those fields.

For a lobbying firm or self-employed lobbyist lobbying on behalf of a client, DO NOT check “Self”. State the name and address of the client. Lobbying firms must file a separate registration for each client. The client address is required in this case.

LINE 8. CLIENT PRINCIPAL PLACE OF BUSINESS: If 'Self' is not checked, indicate the client's principal place of business (city and state and country), if different from line 7.

LINE 9. GENERAL DESCRIPTION OF CLIENT'S BUSINESS OR ACTIVITIES: If 'Self' is not checked, provide a general description of the business or activities of the client (see instructions to line 6 for examples). The client address is required in this case.

LINE 10. LOBBYISTS: List the name of each individual who acted or is expected to act as a lobbyist for the client identified on line 7. Enter the first name, last name and suffix in the separate fields provided. If any person listed in this section has served as a "covered executive branch official" or "covered legislative branch official" within two years of first acting as a lobbyist for the client, identify that person as a "covered official" and state the executive and/or legislative position in which the person served. Self-employed lobbyists must restate their names on this line and indicate any covered status as described above.

At least one lobbyist must be listed to complete the filing. If more than five lobbyists are to be listed, complete the first five, then click the blue > button in the right margin labeled 'Go to Page 3 to add more lobbyists'. This will move the focus to the 'Additional Lobbyists' section on Page 3, where six more names may be added. If more than eleven lobbyists are to be listed, go to the bottom of page three, click the orange > button labeled 'Add an additional supplementary information page', and continue adding lobbyists on the next page. When all lobbyists have been entered, click the 'Return to page 2...' button in the right margin to return to Line 11.

LINE 11 LOBBYING ISSUES: Select categories from the following list that most closely match the client's lobbying issue areas. The form provides a list of descriptions and corresponding codes (for reference only) in a select box above the fields where the codes are to be entered. Select each applicable code from the small select boxes on line 11. Enter as many as necessary to accurately reflect all actual and anticipated lobbying activities. If more than nine lobbying issues apply, click the blue > button in the right margin labeled 'Go to page 3 to add more lobbying issues'. This will move the focus to page 3, where nine more issues may be selected.

Please see Lobbying Issue Codes for a complete list

LINE 12. SPECIFIC LOBBYING ISSUES: Identify the client's specific issues that have been addressed (as of the date of the registration) or are likely to be addressed in lobbying activities. Include, for example, specific bills before Congress or specific executive branch actions. BE SPECIFIC, but brief. Bill numbers alone do not satisfy the requirements for reporting on this line and restatement of the general issue code is insufficient. Use the following format to describe legislation: BILL NO, BILL TITLE, AND DESCRIPTION OF THE SPECIFIC SECTION(S) OF INTEREST, i.e.;

"H.R. 3610, Department of Defense Appropriations Act of 1996, Title 2, all provisions relating to environmental restoration."

For specific issues other than legislation, provide detailed descriptions of lobbying efforts. Do not leave line blank. No additional space is available, so please abbreviate and enter the information in paragraph format to maximize space.

LINE 13. AFFILIATED ORGANIZATIONS: Identify the name, address, and principal place of business of any entity other than the client that contributes in excess of $10,000 toward the registrant's lobbying activities in a semiannual period and in whole or in major part plans, supervises, or controls such lobbying activities.

Either 'No' or 'Yes' must be checked. If 'No' is checked, the affiliated organization lines will be 'skipped'. If 'Yes' is checked, at least one affiliated organization name and address is required. If 'No' is checked after information has been entered in the lines, the information will be deleted.

If more than three affiliated organizations are to be listed, complete the first three, then click the blue > button in the right margin labeled 'Go to Page 3 to add more affiliated organizations'. This will move the focus to the 'Additional
Affiliated Organizations' section on Page 3, where three more names may be added. If more than six affiliated organizations are to be listed, go to the bottom of page three, click the orange > button labeled 'Add an additional supplementary information page', and continue adding organizations on the next page. When all organizations have been entered, click the 'Return to page 2...' button in the right margin to return to Line 14.

**LINE 14. FOREIGN ENTITIES:** Identify the name, address, principal place of business, amount of any contribution in excess of $10,000, and the approximate percentage of equitable ownership in the client of any foreign entity that:

- holds at least 20% equitable ownership in the client or any organization identified on line 13; or
- directly or indirectly, in whole or in major part, plans, supervises, controls, directs, finances, or subsidizes activities of the client or any organization identified on line 13; or
- is an affiliate of the client or any organization identified on line 13 and has direct interest in the outcome of the lobbying activity.

Either 'No' or 'Yes' must be checked. If 'No' is checked, the foreign entity lines will be 'skipped'. If 'Yes' is checked, at least one foreign entity name, address, principal place of business, contribution amount and percentage of ownership is required. If no contribution was made and no ownership exists, enter zero in those fields. If 'No' is checked after information has been entered in the lines, the information will be deleted.

If more than two foreign entities are to be listed, complete the first two, then click the blue > button in the right margin labeled 'Go to Page 3 to add more foreign entities'. This will move the focus to the 'Additional Foreign Entities' section on Page 3, where three more names may be added. If more than five foreign entities are to be listed, go to the bottom of page three, click the orange > button labeled 'Add an additional supplementary information page', and continue adding entities on the next page. When all entities have been entered, click the 'Return to page 2...' button in the right margin to return to Line 14.

**PRINTED NAME AND TITLE.** Enter the name and title of the person who will sign the filing, either with a digital signature for electronic filing, or a handwritten signature for paper filing. The signer must be the officer or employee of the registrant who is responsible for the accuracy of the information contained in the registration.
LD2 Instructions

To complete the form, begin by selecting registrant type, then TAB or use the mouse to move from field to field as you enter data. In some cases, your selection may control the movement to the next appropriate field. When you have completed all of the information, click the red "Form Complete" button, which will run the validation. See Using Electronic Forms for more help with using the forms.

The detailed help below includes both information relating to filing requirements under the Lobbying Disclosure Law, and technical information (in italics) about using the form functionality.

All filers are required to complete the first page.

**LINE 1. NAME:** If the registrant is a lobbying firm or an organization employing in-house lobbyists, enter the full legal name exactly as you originally registered. If the registrant is a self-employed lobbyist, click 'Individual' to switch to name fields, then select the preferred prefix and enter the first name and last name. If you used a middle name, initial or suffix when you filed, enter a middle name or initial with the first name and the suffix with the last name. For future electronic filing, it is important to enter the name exactly the same each time.

**LINE 2. REGISTRANT ADDRESS.** Enter the mailing address for correspondence. Mark the box if the address is different than previously reported. A full address is required to complete the filing.

**LINE 3. PRINCIPAL PLACE OF BUSINESS.** Indicate the city, state and country of the registrant's principal place of business, if different from the address on line 2.

**LINE 4. TELEPHONE NUMBER AND CONTACT NAME.** Enter the telephone number, including area code. Please use the (222)222-2222 or 222-222-2222 format. A US telephone number is preferred. Select the preferred prefix (Mr., Ms. Mrs.), and enter the full name of the person to contact for any questions concerning the registration. Enter the contact e-mail address. A telephone number, contact name and email address in valid format are required to complete the filing.

**LINE 5. SENATE IDENTIFICATION NUMBER.** This number, assigned by the Office of Public Records, is unique to each registrant-client relationship. Enter the number and use it in all correspondence pertaining to this relationship.

**LINE 6. HOUSE IDENTIFICATION NUMBER.** This number, assigned by the Legislative Resource Center, is unique to each registrant-client relationship. Enter the eight-digit number and use it in all correspondence pertaining to this relationship. This number is required to complete the filing.

**LINE 7. CLIENT NAME.**

- For an organization lobbying on its own behalf, check the box labeled 'SELF'. When 'Self' is checked, the registrant name is inserted in the client name line.

- For a lobbying firm or self-employed lobbyist lobbying on behalf of a client, DO NOT check “Self”. State the full name of the client exactly as you listed it in the registration. Lobbying firms must file a separate report for each client. The client name is required to complete the filing.

**LINE 8. YEAR.** Enter the year and mark the appropriate box to indicate which semiannual reporting period is being covered by this report. A separate report is required for each filing period. A valid four-digit year is required. Electronic filing is only available for reports and amendments for the year-end 2004 report and later. However, older reports or amendments may be prepared on the form and printed for filing by mail or hand delivery.

**LINE 9. AMENDED REPORT.** If amending a previously filed version of this report, place a mark in the box. Otherwise, leave blank.

**LINE 10. TERMINATION REPORT.** If lobbying for the client has ended and the registrant wishes to terminate this registration, mark the box and enter the date that lobbying activities ceased. Enter the date in mm/dd/yyyy format. It is not necessary to put '0' in front of a single digit day or month. The date must be in the filing period you have marked in Line 8. If the date entered is not in that period, an error message will be returned.
LINE 11. NO ACTIVITY BOX. If there was no reportable lobbying activity, mark the box. Otherwise, file a complete report detailing the lobbying activity. If this box is checked, page 2 will no longer be displayed as it does not need to be part of the filing. If this box is checked after entering issue information, that information will be deleted.

INCOME OR EXPENSE SUMMARY (ANSWER LINE 12 OR LINE 13 AS INSTRUCTED). The form will only allow the appropriate section to be completed. Any attempt to check a box or enter an amount in the incorrect area will return an error message.

LINE 12. LOBBYING FIRMS (INCOME). Indicate whether income relating to lobbying activities on behalf of the client identified on line 7 was less than $10,000, or was $10,000 or more, during this reporting period by placing a mark in the appropriate box. If income was $10,000 or more, provide a good faith estimate of all lobbying related income from the client (include all payments to the registrant by any other entity for lobbying activities on behalf of the client). Round estimates to the nearest $20,000. One selection is required for lobbying firms. Any amount under $10,000 entered in the line will return an error.

LINE 13. ORGANIZATIONS (EXPENSES). Indicate whether expenses related to lobbying activities were less than $10,000, or were $10,000 or more, during the reporting period by placing a mark in the appropriate box. If expenses were $10,000 or more, provide a good faith estimate of all lobbying expenses (include all payments to third parties for lobbying activities) and round estimates to the nearest $20,000. One selection is required for organizations lobbying on their own behalf. Any amount under $10,000 entered in the line will return an error.

LINE 14. REPORTING METHODS. Mark the appropriate box to indicate the expense accounting method used to determine expenses. One selection is required if 'Self' is checked.

• Method A. Reporting amounts using LDA definitions only. This method is available to all organizations.

• Method B. Reporting amounts using Internal Revenue Code definitions as defined under Section 4911(d) of the IRC. This method is only available to a NON-PROFIT registrant that is required to report and does report under Section 6033(b)(8) of the IRC. The amount disclosed must pertain to the semiannual period covered by this report.

• Method C. Reporting amounts using Internal Revenue Code definitions of lobbying activities, of which the cost is not deductible pursuant to Section 162(e) of the IRC. This method is available to any registrant that is subject to Section 162(e) of the IRC. The amount disclosed must pertain to the semiannual period covered by this report. Grass-roots and state lobbying expenses may not be subtracted from this amount.

FIRST PAGE SIGNATURE. This signature line will appear after the form is validated and prepared for printing and/or electronic submission.

• Electronic Filing -- When the report is complete and validation successful, the digital signature will be applied on this line.

PRINTED NAME & TITLE. Enter the name and title of the person who will sign the filing. This entry is required to complete the filing.

PAGE 2. The electronic form includes one lobbying issue page when it is opened. By clicking the orange > button at the bottom of the page, the next issue may be added. The pages will be automatically numbered. In addition, supplementary pages for additional specific issues description and additional lobbyists related to one general lobbying issue are also available and may be added to the document by orange > buttons in the right margin of those sections. When supplementary pages are added to a general issue, the general issue code will be automatically entered on the issue line. If a supplementary or issue page is added in error, DO NOT DELETE THE PAGES FROM THE MENU OR PAGES TAB. ALL BLANK PAGES WILL BE AUTOMATICALLY DELETED IN THE FINAL STEPS.

LINE 15. GENERAL LOBBYING ISSUE AREA. Select the applicable code(s) from the list below which accurately reflect all general areas in which the registrant engaged in lobbying during the reporting period, whether or not the issue area was previously disclosed. Add a separate page for each code selected, using the orange button at the bottom of the issue page just completed. The select box lists both the code and description for convenience. The code is required and must be entered before supplementary pages can be added.

Please see Lobbying Issue Codes for a complete list.
LINE 16. SPECIFIC LOBBYING ISSUES. For each general lobbying area, list the specific issues which were actually
lobbied during the semiannual period. Include, for example, specific bills before Congress or specific executive branch
actions. BE SPECIFIC. Bill numbers alone do not satisfy the requirements for reporting on this line and restatement of
the general issue code is insufficient. Use the following format to describe legislation: BILL NO., BILL TITLE, AND
DESCRIPTION OF THE SPECIFIC SECTION(S) OF INTEREST.

i.e., "H.R. 3610, Department of Defense Appropriations Act of 1996, Title 2, all provisions relating to environmental
restoration."

For specific issues other than legislation, provide detailed descriptions of lobbying efforts. Do not leave line blank.

To maximize space, use a paragraph format. When the available area is full, add another page by clicking the orange >
button labeled 'Add more specific issues' in the right margin at the top of Line 16. If one additional page is not enough,
another may be added from the button at the bottom of the supplementary page.

LINE 17. CONTACTS. Identify the Houses of Congress and Federal agencies contacted by the registrant in connection
with the general issue area during the reporting period. Disclose only the houses or agencies, such as "Senate," "House of
Representatives," "Department of Agriculture," or "Executive Office of the President," rather than the individual office.
If there were no contacts during the period, mark the box labeled "none." This line is required to complete the filing.

LINE 18. LOBBYISTS. List the name of each lobbyist who had any activity in this general issue area. Enter the first
name, last name and suffix in separate fields. If there are lobbyists not previously disclosed, enter the names of the new
lobbyist(s) under each pertinent issue code, and mark the box labeled "New." If any new lobbyist listed in this section
has served as a "covered executive branch official" or "covered legislative branch official" within two years of first
acting as a lobbyist for the client, identify that person as a "covered official," state the executive and/or legislative
position in which the person served. NOTE: The 20% threshold does not apply to this line and is only used for
determining who may be considered a "lobbyist" for registration/updating purposes.

LINE 19. FOREIGN INTEREST. Describe the interest of each foreign entity in the specific issues listed on line 16. If
there are no foreign entity interests in this issue, check the box marked 'None'. If 'None' is checked, an error message will
be returned if data is also entered in the text box.

SIGNATURE. If this is the last page of the report, sign and date this page and type or print the signer's name and title.
Only the last page of the report need be signed. Form LD-2DS must be signed and dated by the officer or employee of
the registrant who is responsible for the accuracy of the information contained in the report.

PAGE 3. INFORMATION UPDATE PAGE. Complete only where registration information has changed. The
electronic form includes one update page when it is opened. By clicking the orange > button at the bottom of the page,
an additional update page may be added for more data. The pages will be automatically numbered.

If a supplementary page is added in error, do not delete the pages from the menu or pages tab. All blank pages will be
automatically deleted when the form is prepared for filing.

LINE 20. CLIENT NEW ADDRESS. Enter complete address of the client if different than previously reported. No
address may be entered here if 'Self' is check in the client name box.

LINE 21. CLIENT NEW PRINCIPAL PLACE OF BUSINESS. Indicate the client's new principal place of business
(city, state and country), if different from line 20. No address may be entered here if 'Self' is check in the client name
box.

LINE 22. NEW DESCRIPTION OF CLIENT'S BUSINESS OR ACTIVITIES. Provide a general description of the
new business or activities of the client. No business description may be entered here if 'Self' is check in the client name
box.

LINE 23. LOBBYIST DELETE. Enter the name of each individual who no longer acts as a lobbyist for the client
identified on line 7. Enter the first name, last name and suffix in separate boxes. If there are no names to remove, skip to
line 24.

LINE 24. GENERAL ISSUE AREA DELETE. Select the codes from the list on page 3 of the instructions of all
previously reported issue areas that no longer apply and enter them on line 24. If there are no codes to be deleted, skip to
line 25.

LINE 25. AFFILIATED ENTITY ADD. Identify the name, address, and principal place of business of any entity other
than the client that contributes in excess of $10,000 toward the registrant's lobbying activities in a six-month period, and
in whole or in major part plans, supervises, or controls such lobbying activities. If an entity name is entered, the address is required.

**LINE 26. AFFILIATED ENTITY DELETE.** List the names of all previously reported organizations that no longer meet the disclosure requirement. If there are no organizations to remove, skip to line 27.

**LINE 27. FOREIGN ENTITY ADD.** Identify the name, address, principal place of business, amount of any contribution in excess of $10,000, and the approximate percentage of equitable ownership in the client of any foreign entity that:

- holds at least 20% equitable ownership in the client or any organization identified on line 13 of the registration or line 25 of this report; or
- directly or indirectly, in whole or in major part, plans, supervises, controls, directs, finances, or subsidizes activities of the client or any organization identified on line 13 of the registration or line 25 of this report; or
- is an affiliate of the client or any organization identified on line 13 of the registration or line 25 of this report and has direct interest in the outcome of the lobbying activity.

**LINE 28. FOREIGN ENTITY DELETE.** List the names of all previously reported foreign entities that no longer meet the disclosure requirement. Leave this line blank if there are no deletions.

**SIGNATURE FOR PAPER FILING.** If this is the last page of the report, sign and date this page and type or print the signer's name and title. Only the last page of the report needs to be signed. Form LD-2 must be signed and dated by the officer or employee of the registrant who is responsible for the accuracy of the information contained in the report.
Import Tool

The following files are available for downloading to help you work with the import tool:

**Import Tool:**

Import.zip

This zip file contains the following files:

- ushrIFX.ifx (viewer import feature)
- ld1.xml (sample import file)
- Ld2.xml (sample import file)
- ld1_schema.xsd (LD1 Schema)
- ld1_schema.xsd (LD2 Schema)

**Sample Database:**

import_sample.zip

This zip file contains an Access database with sample lobbying disclosure activity. The database has an export function that will demonstrate how to export as XML so that you can import the data directly into each form. The database schema and mappings to the LD forms are located in a MS Word document.
IBM Workplace Viewer System Requirements

IBM Workplace Viewer requires the following minimum system configuration:

- 500 MHz processor;
- Microsoft Windows 2000 SP2 or Microsoft Windows XP SP1;
- 256 Mb Ram;
- 200 Mb disk space;
- 800 X 600, 16 bit screen resolution.
Frequently Asked Questions

The topics listed below provide answers to commonly asked questions about the Lobbying Disclosure Electronic Filing System.

What’s New

New Form Application

The IBM Workplace Forms are now available with the following features:

- A single registration or reporting form can be edited, signed, and filed from the filers desktop;
- Active registrants can use reporting forms for each client that are pre-populated with their House ID, registrant information, and client name. New client registration forms are also pre-populated with the registrant information;
- Previously filed IBM Workplace forms can be used to create new filings, such as amendments, by removing the signature, modifying the form, and then resigning and submitting the form;
- Only valid ACES digital signatures can be selected to sign the new forms;
- Forms can be filed with both the House and Senate from the desktop using any internet connection, including dial up;
- The help manual can now be accessed from within the form to assist you with completing them.

Signing Form Screen

The screen to sign your form is different in the IBM Workplace Viewer; it does not display a list of installed signatures when you click the signature line, it displays the message “No Signature”. To apply your signature, click the Sign button. If you have a valid ACES digital signature, it is automatically applied to the form. If you have not purchased one, a message is displayed that you do not have the appropriate signature to sign the form.

See Signing and Filing Forms with the House for more information

Improved Filing Status Messages

The filing confirmation and status messages that are sent by the system now include the client name and House ID.
Required Software and Forms

Am I required to buy software to use the electronic Lobbying Disclosure forms?

No. The IBM Workplace Viewer is free of charge and can be downloaded from the Forms and Software page in the Windows Platform section of the Lobbying Disclosure website. An installation CD will be mailed to each registrant when the new forms are released.

Can I use my older Adobe Reader forms for the next filing period?

If you have already completed your forms in Adobe, you may file them with the Office of the Clerk through January 16, 2007. The IBM Workplace forms will be required for filing registrations and reports after this date.

Digital Signatures

How long will it take to get an ACES signature?

Processing your application can take as little as 2 - 4 days. However, due to the identity and verification requirements, the entire process (from application to receipt of the ACES digital signature certificate) can take as long as 1 to 2 weeks.

May I use my digital signature certificate for other purposes?

Yes. A subscription certificate may be used for a document if the receiver will accept the certificate.

How can I print a copy of the LD report that includes the signature line?

A blank signature line is printed automatically if the form is not signed with your digital signature. It should be noted that paper filings are only accepted by the Senate. House filings must be submitted electronically, except for filing amendments preceding the 2004 Year End filing period (07/01/04).

Can I move my ACES digital signature to another PC or a laptop?

Yes. If you need to move your digital signature to another PC or a laptop, you can use the Certificate Export Wizard within your browser to create a backup of your digital signature and the Certificate Import Wizard to install it on another computer.

See http://lobbyingdisclosure.house.gov/contact.html for a list of vendor support sites
Filing Registrations, Reports, and Amendments

Can I file electronically if I am registering to do lobbying for the first time?

If you are registering with the House, you must submit your LD-1DS Registration form electronically. Your House ID will be included in your confirmation email and used for all future filings.

See [http://lobbyingdisclosure.house.gov/register.html](http://lobbyingdisclosure.house.gov/register.html) for more information on new registrations

If you are registering with the Senate, you must submit your LD-1DS form on paper. When you receive your Senate ID, you may use it to file your future forms electronically if you have a valid Senate password. Please contact the Office of Public Records, Secretary of the Senate, for more information on obtaining a Senate password.

See [http://lobbyingdisclosure.house.gov/contact.html](http://lobbyingdisclosure.house.gov/contact.html) for Senate contact information

Can I file electronically to add a new client or update my registration?

If you are already registered with the House and Senate, you can use the LD-1DS form to register a new client. Instructions on how to fill out the LD-1 form for new client registrations are listed in the user manual.

See [http://lobbyingdisclosure.house.gov/register.html](http://lobbyingdisclosure.house.gov/register.html) for more information on registering new clients

Can I file an old report or amendment electronically?

Electronic filing is limited to filing reports for the periods beginning July 1, 2004 and later. If you wish to file or amend a report for an earlier period, you may use the electronic form to fill out the data, and then print the form for paper filing.

What information will I need to prepare the form?

The requirements to fill out each field in the form have not changed, but it is very important that you enter the registrant name, client name, and House ID exactly as it is registered with the Clerk. To assist you, pre-populated forms have been created with this information already inserted. You can download a pre-populated form for each client from the Forms and Software Page by searching for your registrant name.

Where do I go for help with the form?

A guide to completing lobbying disclosure forms is available on the Home page of the Lobbying Disclosure website that includes definitions and examples of what should be included on the forms.

See Filing Guidelines for more information on completing the content of your forms

Technical and line by line instructions on how to complete each form are available in the Help manual. This manual is available on the Lobbying Disclosure website or from the Online Help button in the form header. The manual includes answers to frequently asked questions, a troubleshooting guide that contains solutions to commonly reported problems, and online tutorials that guide you through the steps to complete, save, sign, and file your forms.

If you can't find an answer in the Help manual, you may call the Legislative Resource Center at 202-226-5200 for assistance.

See Where to get Help for more information
Submitting Forms Electronically

Can I use the electronic House Lobby Disclosure forms to file with the Senate?

You must file first time lobbying registrations with the Senate on paper. You can file new client registrations and activity reports with the Senate if you have a current Senate ID and password.

How will I know if my filing is complete after I have submitted it?

You will receive a separate web response from the House and the Senate when you file electronically.

If you are filing with the House you will also receive an email from the Office of the Clerk indicating the status of your electronic filing. If your digital signature fails validation you will receive a failure notice. If your digital signature is valid, but the combination of the registrant name, client name and House ID that you submit does not match current records, you will receive a pending review notice. The Legislative Resource Center staff will review the filing and notify you of the results.

See Understanding Electronic Filing for more information

If you are filing with the Senate and you have entered the wrong ID or password, the message “Invalid Senate ID and/or Password” is displayed. Please contact the Senate Office of Public Records for help.

See Filing Forms with the Senate For more information
Troubleshooting Guide

The topics listed below provide solutions to commonly reported problems with the Lobbying Disclosure Electronic Filing System. Please contact the Legislative Resource Center if the problem you are experiencing is not listed in these areas.

Signature is not listed when signing

The IBM Workplace Viewer does not use the same screens that Adobe Reader used for signing forms. When you click the signature line it will not display a list of installed signatures, it displays the message “No Signature”, as shown below:

This message refers to the status of your form; it does not mean you do not have a valid signature.

When you click the sign button your signature is applied to the form, the sign button becomes inactive, and the window is updated with your signature information.
Error messages when signing

If there is a problem with your signature, an error message will be displayed button in the Digital Signature Viewer window when you click on the Sign button in the Digital Signature Viewer window. The error messages and resolutions are listed below:

<table>
<thead>
<tr>
<th>Error Message</th>
<th>Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>The specified CSP doesn’t contain any unexpired digital signature certificates matching your certificate filter</td>
<td>This message is displayed if you do not have a valid ACES digital signature certificate installed. You must purchase an ACES digital signature to sign and submit your forms with the House. If you have purchased one, it may not be installed correctly and you must contact the vendor you purchased the certificate from to resolve the problem</td>
</tr>
</tbody>
</table>

Form won’t submit to the House

Your submission may time out due to slow internet connection speeds. If this happens, you can wait a few minutes and submit your form again. If you have many users on a DSL or cable connection you may want to try submitting your form earlier or later in the day when there aren’t as many users accessing the connection.

If you continue to receive time out messages, several factors may be causing the problem:

- Virus protection restrictions. Some 3rd party virus scanning and firewall products will restrict you from sending files over the internet. Please review the security settings in any virus scanner and firewall applications and make the appropriate adjustments to allow transmission of files to house.gov;

- Network restrictions. Some registrants have firewall restrictions from within their network that do not allow users to transmit files over the internet. You will need to discuss this with your IT department for a solution. If the restrictions cannot be changed please contact LRC to discuss alternatives. Some companies have written their signed form to CD or set up an FTP site so that the LRC can access the form and file it for you.

Form fails signature validation after it’s submitted

If you receive a status message that your signature has been suspended or revoked, you must contact the vendor where you purchased the signature to resolve the issue. When the problem has been resolved, sign and re-file your form.

If you receive a status message that the certificate authority for your signature could not be found you did not sign your form with an ACES signature. If you believe you have purchased an ACES digital signature, there is a problem with the installation of the signature and you must contact the vendor to get it installed correctly.

E-Mail status messages are not being received

If you are not receiving the filing status messages that are being sent, one of the following may be the problem:

- The status message is sent to the point of contact email address on each form. Please check the email address on your forms and verify it is correct;

- Spam blockers may be rejecting the email, or filtering it to a junk mail folder. Add the domain name efiling@mail.house.gov to your address book or safe list.
Glossary of Terms

Affiliated Organization
Any entity other than the client that contributes in excess of $10,000 toward the registrant's lobbying activities in a semiannual period, and in whole or in major part plans, supervises, or controls such lobbying activities.

Activity Report
Section 5(a) of the LDA requires a registrant to file a report for the semiannual period in which it incurred its registration requirement, and for each semiannual period thereafter, through and including the reporting period for which it terminates its registration. A semiannual report on Form LD-2 filed pursuant to Section 5 of the Act (2 U.S.C. § 1604).

Client
Any person or entity that employs or retains another person for financial or other compensation to conduct lobbying activities on behalf of the person or entity. An organization employing its own lobbyists is considered its own client for reporting purposes.

Electronic Filing
An electronic process that replaces the method that registrants used to manually sign and file their forms on paper.

Entity
Any individual, corporation, company, foundation, association, labor organization, firm, partnership, society, joint stock company, group of organizations, or state or local government.

Electronic Form
An electronic Lobbying Disclosure form that is formatted to replicate the paper version for electronic filing.

In whole or major part
The term "in major part" means in "substantial" part. It is not necessary that an organization or foreign entity exercise majority control or supervision in order to fall within Sections 4(b)(3)(B) and 4(B)(4)(B). In general, 20 percent control or supervision should be considered "substantial" for purposes of these sections.

Lobbying Activities
Lobbying contacts and any efforts in support of such contacts, including preparation or planning activities, research and other background work that is intended, at the time of its preparation, for use in contacts and coordination with the lobbying activities of others.
Lobbying Contact
Any oral, written or electronic communication to a covered official that is made on behalf of a client with regard to the enumerated subjects at 2 U.S.C. § 1602(8)(A). Note the exceptions to the definition at 2 U.S.C. § 1602(8)(B). See Discussion at Section 5 below.

Lobbying Firm
A person or entity consisting of one or more individuals who meet the definition of a lobbyist with respect to a client other than that person or entity. The definition includes a self-employed lobbyist.

Lobbyist
Any individual who is employed or retained by a client for financial or other compensation for services that include more than one lobbying contact, other than an individual whose lobbying activities constitute less than 20 percent of the time engaged in the services provided by such individual to that client over a six month period.

Registrant
A lobbying firm or an organization employing in-house lobbyists that files a registration pursuant to Section 4 of the Act.

Registration
An initial registration on Form LD-1 filed pursuant to Section 4 of the Act (2 U.S.C. § 1603) which states that lobbying firms, (i.e., entities with one or more lobbyists), including self-employed individuals who act as lobbyists for outside clients, are required to file a single registration, and to file a separate registration for each client with the Secretary of the Senate and the Clerk of the House of Representatives.

Termination
A registrant who is no longer employed or retained by a client to conduct lobbying activities and does not anticipate any additional lobbying activities for a client, may so notify the Secretary of the Senate and the Clerk of the House of Representatives and terminate its registration.