



# **Lobbying Disclosure Electronic Filing Contribution Reporting System**

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**User Manual**

**July 2009**



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# Introduction

This manual will explain the filing requirements of the LD-203 Contribution Reports and provides step by step instructions for completing and filing electronic Lobbying Disclosure Contribution forms. It is available online from the Contribution Reporting website, and in a printable format. The table of contents and comprehensive index allows you to locate specific functions you may need help with. All major topics related to the contribution system also have an online tutorial that may be viewed in your browser by clicking on the link located next to the title.

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 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. You may also locate information by topic using the Index button or by searching for keywords using the Search button.

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See [Tutorials](#) for a special message from the Clerk and Secretary

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## ***General Filing Requirements***

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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 on lobbying and certain contributions and expenses with the Secretary of the Senate and the Clerk of the House of Representatives.

The Registration form (LD-1) is used for the initial registration under Section 4 of the Act (2 U.S.C. § 1603). The Report Activity form (LD-2) is used for complying with the quarterly reporting requirements of Section 5 of the Act (2 U.S.C. § 1604). The contribution form (LD-203) is used for the semi annual disclosure of certain contributions pursuant to Section 5 of the Act (2 U.S.C § 1604(d)).

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

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See [Guidance](#) for more information

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## **Who Must File**

Active registrants and individuals who have been listed as active lobbyists by their employer-registrant on the Registration and Reporting forms must file a semi annual report on Form LD-203 for each semi annual period in which they remain active.

In the case of a registrant, "active" means not having filed a valid termination report for all clients. In the case of a lobbyist, "active" is an employee listed on any registrant's registration or reporting form and who has not been terminated by the Registrant through their listing of the lobbyist name on Line 23 of the reporting form as being removed. If a lobbyist is active for any part of or for all of a semi-annual period, he or she must file a contribution report.

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Please see [Section 8 of the Guidance](#) for more information

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## Filing Deadlines

The coverage periods for the semi annual reports are January 1 through June 30, and July 1 through December 31. The semi annual contribution report is required to be filed no later than 30 days after the end of the semi annual period beginning on the first day of January and July, or on the first business day after such 30th day if the 30th day is not a business day. The filing deadlines for contribution reports are:

- **July 30** \* for the January 1 – June 30 mid year reports;
- **January 30** \* for the July 1 – December 31 year end reports.

\*If the deadline falls on a weekend or holiday, the report is due the following business day.

## Where to File Forms

Section 5 of the LDA was amended to require the mandatory electronic filing of all documents required by the LDA. Registrants and lobbyists must file the contribution form with the Office of the Clerk of the U.S. House of Representatives and the Secretary of the U.S. Senate. The contribution form provides the ability to electronically file the form with both the Clerk of the U.S. House and the Secretary of the U.S. Senate using an ID and password.

The only exception to mandatory electronic filing is for the purpose of amending reports in the format previously filed, or for compliance with the Americans with Disabilities Act. All electronic lobbying disclosure forms provide usability for people with vision impairments who have the appropriate software and hardware. If you have questions regarding additional ADA accommodations, please contact the Senate Office of Public Records at (202) 224-0758.

## Review and Compliance

The Clerk of the House and the Secretary of the Senate must review, verify, and request corrections in writing to ensure the accuracy, completeness, and timeliness of registrations filed under the Act.

## Penalties

Whoever knowingly fails: (1) to correct a defective filing within **60 days** after notice of such a defect by the Secretary of the Senate or the Clerk of the House; or (2) to comply with any other provision of the Act, may be subject to a civil fine of not more than \$200,000. Whoever knowingly and corruptly fails to comply with any provision of this Act may be imprisoned for not more than 5 years or fined under the title 18, United States Code, or both.

## Public Availability

The Act requires the Secretary of the Senate and the Clerk of the House of Representatives to make all documents filed under the LDA available for public inspection over the Internet as soon as technically practicable after the report is filed.

## ***Understanding Electronic Filing***

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Access to the Contribution Reporting system is based on the current LDA registration process for the House and Senate. Self employed lobbyists and organizations must first register to lobby, and provide a list of the individuals who will be lobbying for each client. When a registration is accepted, Senate and House ID numbers are assigned. Registrants will continue to use their House and Senate ID numbers to file their contribution forms. To meet the new filing requirements, employed lobbyists will be assigned a single lobbyist ID number that will be used to file their contribution forms with both the House and Senate. Each user has an account that is associated with their User ID that contains contact and registration information to pre-populate the forms.

To simplify the contribution filing process, a list of lobbyist names has been created for each registrant from previously filed LDA forms. This list contains information about each employee's account and password status. Registrants control their employee's access to the system by adding new lobbyists after they have been registered and updating the lobbying status of each employee to inactive when the employee is no longer actively lobbying.

This system is web-based and all users must sign in to access a contribution form or update contact information. The form is pre-populated based on the user ID and will alert you if entries on your form are not valid. When your form is complete, it will be filed electronically using your User ID and password. The system is automated and designed to allow registrants and lobbyists to manage their own account information and filings. Account and filing status communications will be sent to each user via email. Lobbyists will also be able to set their own passwords and retrieve them automatically if they forget them.

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See [Tutorials](#) for more information on the electronic filing system

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### **System Requirements**

This system works on both Windows and Macintosh computers. There is no additional software required; you may use this system with any standard browser and your user ID and password.

### **System Overview**

To access the system and file your forms, you must first sign in with your user ID and password. If you are a registrant, you will continue to use the same Senate ID and password that is used to file Lobbying Registration and Reporting forms. If you are an employed lobbyist, you will use the ID assigned by the contribution system and create your own password.

When you are signed in successfully, you should confirm your contact information. Email addresses are essential as all system communications regarding your ID and password, as well as the status of your filings, will be sent to the email address on file for each account.

Each time you sign in to the system, you establish an editing session for the contribution form. The contribution form is interactive and the system will build a unique filing for each reporting period. While you are signed in, you will have the ability to create a new filing, open a saved filing and append it, or retrieve a previously filed form and amend it. Registration information such as the registrant name, Senate, House, and Lobbyist IDs, as well as the contact information you entered for your account, will be pre-populated on the form for you. Once a filing has been created, it will be saved on the system so that you can append it as many times as needed until the report is ready to be submitted.

The signing and submission process has been streamlined from previous lobbying disclosure forms. Because you have already signed into the system with your user ID and password, the system will include this information when you submit the form. You only need to click a single button to file your form with both the House and Senate. When your form has been received, a confirmation message will be displayed that includes a reference number, timestamp, your name, and the year and period you are filing for.

Once a report has been submitted you will receive an e-mail disclosing the status of your filing. The three main messages are approved, pending or failed. If the message states your filing has been approved your report has been successfully filed and will be available to the public over the internet. If the report states your filing is pending, there may be some slight discrepancy between previously submitted information and what is on the form. The House Legislative Resource Center will review the filing and notify you if it was accepted or rejected. If it was rejected, please review the message carefully as it will contain instructions on how to correct the filing so it can be re-submitted successfully.

## ***Where to Get Help***

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Section 6 of the Lobbying Disclosure Act requires that the Secretary of the Senate and the Clerk of the House provide guidance and assistance on the registration and reporting requirements. A Guidance document has been issued that is available on the Clerk and Secretary's lobbying disclosure websites.

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Guidance: [http://lobbyingdisclosure.house.gov/amended\\_lda\\_guide.html](http://lobbyingdisclosure.house.gov/amended_lda_guide.html)

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For step by step instructions on how to use the contribution system and form:

- Review the user manual that is available from the Help tab on the contribution system;

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

- Review the appendices of the user manual for line by line instructions;

For help with your Registrant ID or password:

- Use the links on the sign in page to locate your registrant ID;
- Use the links on the sign in page to request your password from the Office of Public Records via email;

For help with your Lobbyist ID or password:

- Use the links on the sign in page to have your ID and password sent to you via email;
- If you are locked out of the system, contact the Legislative Resource Center via [email](#) or by phone at (202) 226-5200 to reset your password.

For general technical difficulties:

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

If you are experiencing difficulties and cannot find the answer in the step by step instructions, FAQ's, or troubleshooting sections of the User Manual, you can contact us via phone:

**Legislative Resource Center**  
135 Cannon House Office Building  
Washington, DC 20515  
(202) 226-5200  
[lobbyinfo@mail.house.gov](mailto:lobbyinfo@mail.house.gov)

**Senate Office of Public Records**  
232 Hart Senate Office Building  
Washington, DC 20510  
(202) 224-0758  
[lobby@sec.senate.gov](mailto:lobby@sec.senate.gov)

Before contacting, have the following information available:

- Registrant or lobbyist name and ID number;
- Computer operating system;
- 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;
- The name and contact information for your IT support person.

# Accessing the System

To access the Contribution Reporting System:

- Go to <https://ld.congress.gov:4433/LC/> ;
- Sign in with your ID and Password::
- Registrants must sign in using their **Senate ID** and **Password**;
- Lobbyists must sign in using their **Lobbyist ID** and **Password**;

All passwords for the Lobbying Disclosure filing system are case sensitive and must be entered correctly to access the system. If you forgot your ID or password, there are links to locate your ID or password below the appropriate fields on the Home page.

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See [Tutorials](#) for registrant and lobbyist account management demonstrations

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## *Account Prerequisites*

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Before a filer can access the Contribution Reporting System to file the Contribution form, they must have a unique ID and password. Registrants must sign in using their Senate ID and password; employed lobbyists must sign in using the ID assigned by the Contribution Reporting System and the password created by the lobbyist when the account was activated.

If you do not have an ID and Password, please review the steps listed below to obtain one.

### **Obtaining a Registrant ID and Password**

Registrant accounts in the contribution system are unique to each lobbying firm and self employed lobbyist. Registrants are verified by the Senate and assigned an ID and password when they register to lobby for the first client. If you have not registered previously for any client, you may apply for a password online using the link below:

[Online Password Request Form](#)

If you are experiencing problems with the Senate Password Request form or need additional information about your password, please contact:

**Senate Office of Public Records**  
232 Hart Senate Office Building  
Washington, DC 20510  
(202) 224-0758  
[lobby@sec.senate.gov](mailto:lobby@sec.senate.gov)

## Obtaining a Lobbyist ID and Password

Employed lobbyists are assigned a unique ID when they are registered with the House and Senate to lobby and added to the Contribution Reporting System by the person in your organization who manages the registration and reporting filings. When you have been added to the system by your employer an activation email is sent to you automatically. You will not be able to sign in to the system until you have completed the steps to create your password.

If you did not receive your activation email, one of several things may have occurred:

- Your account has not been verified by the registrant yet;
- Your account has been verified, but there is a typo in the email address;
- Your account has been verified and the email address is correct, but your network thinks email from our server is junk mail.

Please see the person in your organization that is responsible for registering you as a lobbyist to verify your account and email address. If your account has been verified and the email address is correct, please contact your IT support person to verify that the email is not being filtered as junk mail.

## *Locating Your ID Number*

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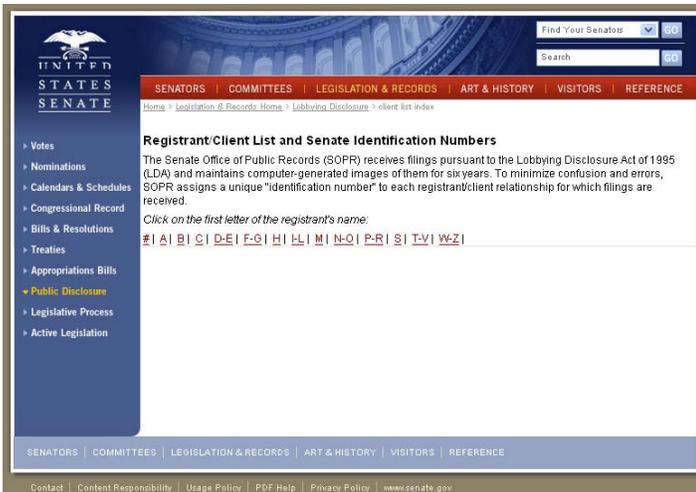
If you forgot your User ID number you can locate it using the appropriate link on the Congressional Reporting System home page.

## Locating Registrant ID Numbers

To locate a registrant ID number:

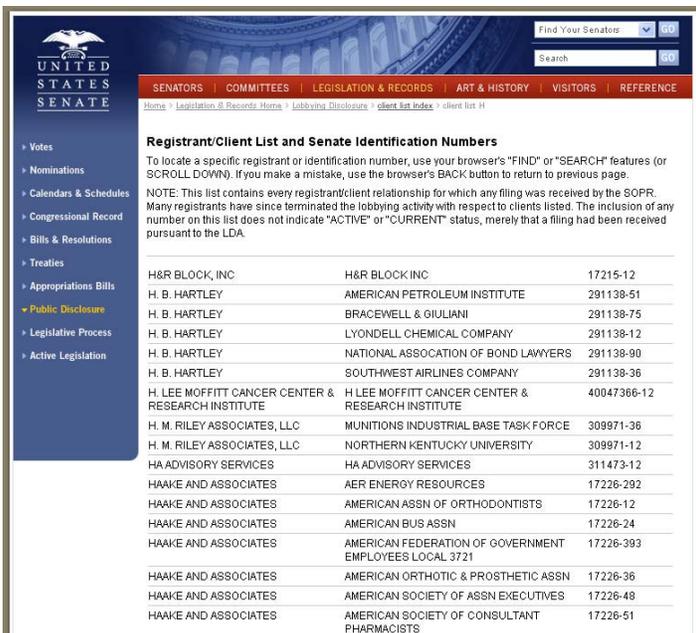


- Click on the **I forgot my registrant ID** link in the **Sign In** section of the **Home** page:



An index of all registrant names is displayed;

- Click on the link in the **first letter index** of the registrant name:



A list of all registrant names that begin with the letter you selected will be displayed along with the full Senate ID number.

*Note: Your Senate User ID is all of the numbers before the hyphen.*

## Locating Lobbyist ID Numbers

To locate lobbyist ID numbers:



- Click on the **I forgot my lobbyist ID** link in the **Sign In** section of the **Home** page;



- Enter your email address in the appropriate field and click the **Find ID** button;



A message will be displayed when your ID has been sent to the email address on file for your account.



*Note: This feature is dependent on the email address for your lobbyist account. If you do not enter it correctly, the system will not be able to locate your ID.*

## Locating Your Password

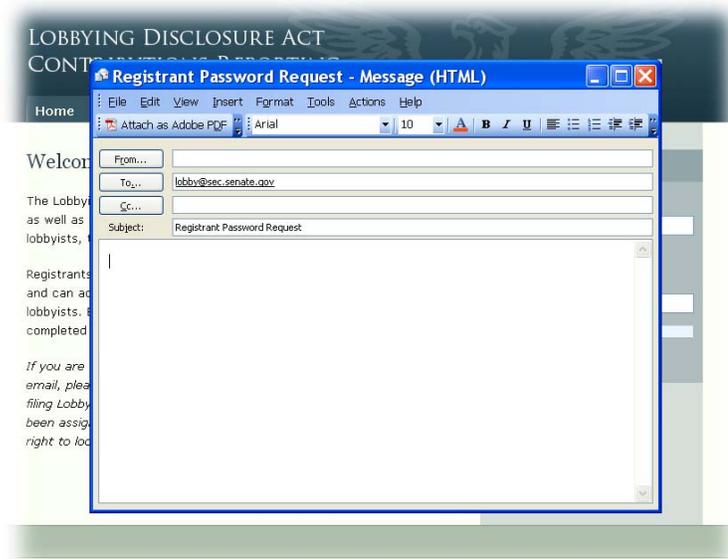
If you forgot your password you can locate it using the appropriate link on the Congressional Reporting System home page.

### Locating Registrant Passwords

To request the password for a registrant in the Sign In section of the Home page:



- Click on the **I forgot my registrant password** link in the **Sign In** section of the **Home** page:



An email window is displayed with the Senate email address and subject line pre-populated;

- Enter your request in the body of the email.

*Note: Registrant password requests will only be sent to the email address on file for that registrant. If you are not one of the official points of contact on file for the registrant, you need to contact the person internally to either obtain the password, or request that he/she send the email requesting the password.*

## Locating Lobbyist Passwords

To locate the password for a lobbyist:



The screenshot shows a 'Please Sign In' form with the following elements:

- User ID:** A text input field with a link below it: "I forgot my lobbyist ID" and "I forgot my registrant ID".
- Password:** A text input field with a link below it: "I forgot my lobbyist password" (highlighted in blue) and "I forgot my registrant password".
- Sign In:** A button at the bottom of the form.

- Click on the **I forgot my registrant password** link in the **Sign In** section of the **Home** page:



The screenshot shows the 'Forgot Your Password?' page with the following elements:

- Name:** A text input field.
- User ID:** A text input field.
- Find Password:** A button next to the User ID field.
- Text:** "Your password will be sent to the email address on file."

- Enter your lobbyist ID in the **User ID** field and press the **Find Password** button:



The screenshot shows the 'Forgot Your Password?' page with the following elements:

- Verify Your Identity:** A text input field.
- Question:** A pull-down menu with the selected question: "What is the make and model of your first car?".
- Answer:** A text input field.
- Find Password:** A button at the bottom of the form.

The security question field is displayed. You may select one of the three questions you set when you activated your account by selecting it from the pull down menu;

- Enter the answer to this question and press the **Find Password** button:

## Password Found

Your password has been sent to the email address on file.

[Sign In](#)

- If you answered the question correctly, an email with your password will be sent to the address on file for your account;

From: **Contribution Accounts** <[LCAccounts@mail.house.gov](mailto:LCAccounts@mail.house.gov)>  
Date: 18 Jun 2008 11:43:47 -0400  
Subject: Lobbying Disclosure Electronic Filing – Your Password  
To: [test.twenty@gmail.com](mailto:test.twenty@gmail.com)

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 **Lobbying Disclosure Electronic Filing**  
United States Congress

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Your requested account information is listed below:

Password: 20Grinch

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<https://ld.congress.gov:4433/LC//home.aspx>

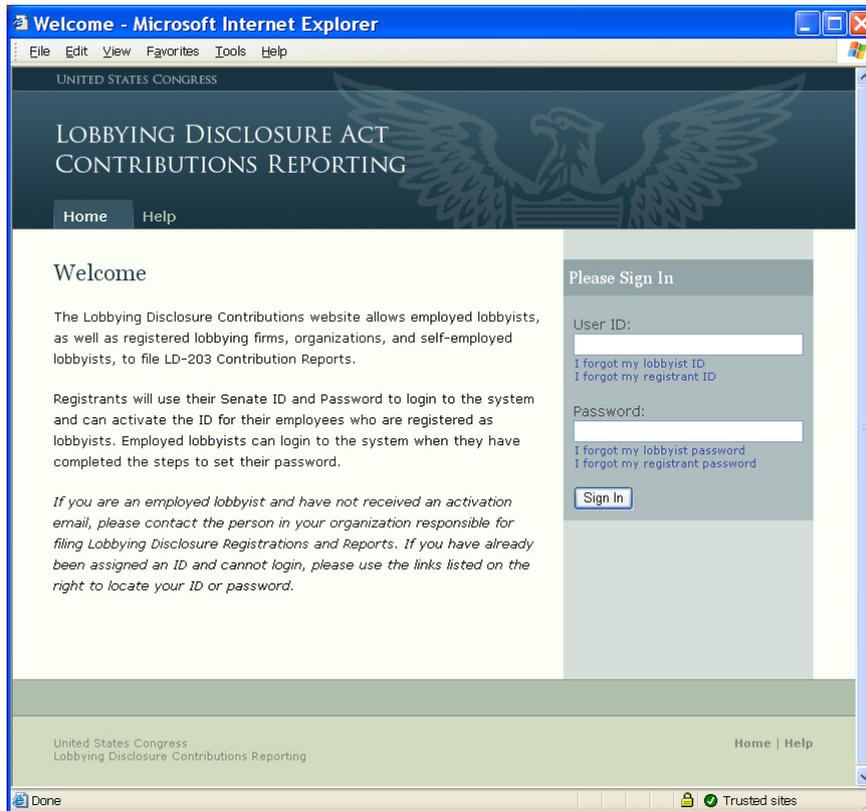
Please do not respond to this e-mail. This mailbox is unattended.

*Note: If you did not answer the question correctly the system will allow you to try two more times. After that your account is locked and you must contact the Legislative Resource Center to unlock it.*

## Signing In to the System

To sign in to the Congressional Reporting System:

- Go to <https://ld.congress.gov:4433/LC/> ;



- Enter your user ID number and password in the appropriate fields on the **Sign In** section of the **Home** page and click the **Sign In** button;
  - Registrants must sign in using their **Senate ID** and **Password**;
  - Lobbyist must sign in using their **Lobbyist ID** and **Password**;



When you have logged in successfully, a profile page is displayed. Tabs are available for all users in the header that allow you to access specific screens so that you can update the information that is pre-populated on the contribution form, or access the form to create a new filing. If you are a registrant, you will also be able to view and manage the names of all the employees that are registered to lobby for your organization.

*Note: All passwords for the Lobbying Disclosure filing system are case sensitive and must be entered correctly to access the system*

# Managing Lobbyist Accounts

Two steps must be completed before lobbyists can sign in to the system and file contribution forms:

- The registrant must verify the name of employees who were registered before 1/1/2008 or add new employees who were registered to lobby after that date;
- The lobbyist must complete the steps to create a password and set their security questions.

Each time the registrant verifies the name of an employee, or adds them to the system, an email is sent to that lobbyist. When the lobbyist completes the steps to set their password, their account is activated and they can sign in and file their forms.

Please review the sections listed below for step by step instructions.

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See [Tutorials](#) for registrant and lobbyist account management demonstrations

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## *Reviewing Lobbyist Accounts*

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The Manage Lobbyist screen will allow you to view, and print, a list of all the employees that were actively registered to lobby on the registration or reporting forms. You can use this list to verify if your employees have been registered and whether the account has been activated so that they are able to sign in and file their contribution reports.

An explanation of the Account and Password Status is listed below:

Account Status	Description
Inactive	The lobbyist account is not currently active.
Active	The lobbyist account is active.

Password Status	Description
Temporary Password	An activation email has been sent to a registered lobbyist, but the account is waiting for the lobbyist to respond to the email and set the password.
Active	The registration for the lobbyist has been verified and the password set so the lobbyist is able to sign into the system and file a contribution form.
Submitted	An activation email has been sent to a new lobbyist but the account is waiting for the lobbyist to respond to the email and set the password.
Pending	A new lobbyist has been added to the system, and the password has been set, but the House Legislative Resource Center is reviewing the registration.
Rejected	A new lobbyist has been added to the system, but the House Legislative Resource Center has reviewed the registrations and rejected the account.
Locked	The wrong password was entered more than 10 times and the account has been locked.

## Adding New Lobbyist Accounts

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To create an account for a newly registered lobbyist, you must add the name to the system. You must add the new lobbyist to the system within the same filing period that you registered the individual to lobby on a Registration or Reporting form. The registration for new lobbyist accounts must be verified by the Legislative Resource Center and approved before the lobbyist can sign in to the system.

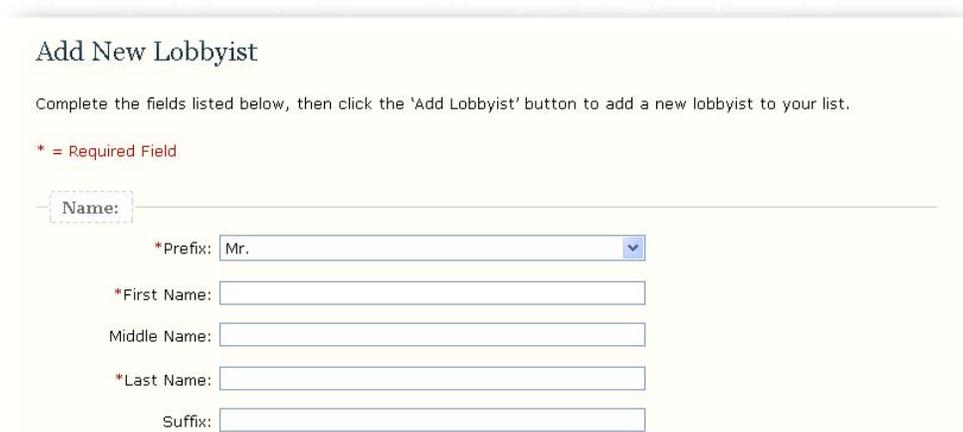
To add a new lobbyist account:

- Click on the **Manage Lobbyists** tab in the header:



The **Manage Lobbyist** screen is displayed;

- Click on the **Add New Lobbyist** button:

A screenshot of the 'Add New Lobbyist' form. The title 'Add New Lobbyist' is at the top. Below it, a paragraph instructs the user to complete the fields and click the 'Add Lobbyist' button. A legend indicates that an asterisk (\*) denotes a required field. The form contains several input fields: a 'Name:' label, a '\*Prefix:' dropdown menu with 'Mr.' selected, a '\*First Name:' text box, a 'Middle Name:' text box, a '\*Last Name:' text box, and a 'Suffix:' text box.

The **Add New Lobbyist** screen is displayed;

- Enter the new lobbyist name in the appropriate fields;

**Contact Information:**

International Number  
 \*Phone Number:   
 \*Email Address:   
 \*Confirm Email:

This email address will be used to notify the lobbyist their account has been activated, and any subsequent communications regarding their account status.

**Account Status**

\*Select:  Active  Inactive  
 \*Effective Date:

You must file an updated LD1 or LD2 form that registers this lobbyist with your organization before the lobbyist account can be added.

- Enter the new lobbyist phone number and email address in the appropriate fields;
- Enter the date the lobbyist began actively lobbying in the **Effective Date** field and click the **Add Lobbyist** button:

Lobbyist Successfully Added

### Manage Lobbyist Accounts

Listed below are the names of all lobbyists that have been registered for your organization. You can use this list to determine if a lobbyist has been added to the system and if their account is approved so they can file a contribution form. To modify a lobbyist account, click on the name.

Show: All Accounts

lobbyistID	Name	Phone	Email	Account Status	Password Status
LarLob863	Lobbyist, Larry	2022222222	larry@contributiontraining.net	Active	Pending
MicLob183	Lobbyist, Michelle	7034441234	michelle@contributiontraining.net	Active	Submitted
NanLob373	Lobbyist, Nancy	2022222222	nancy@contributiontraining.net	Active	Active
KIMLOV875	LOVE, KIMBERLY			Inactive	

The **Manage Lobbyist** screen is displayed with a message that the new account has been added. The password status on the new account is submitted and an activation email has been sent to the new lobbyist.

When the lobbyist activates the account the status is updated to pending and the House Legislative Resource Center will review it. Please remember that the account will not be approved until the name is listed as a new lobbyist on a Registration or Reporting form.

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See [Reviewing Lobbyist Accounts](#) or a list of status definitions

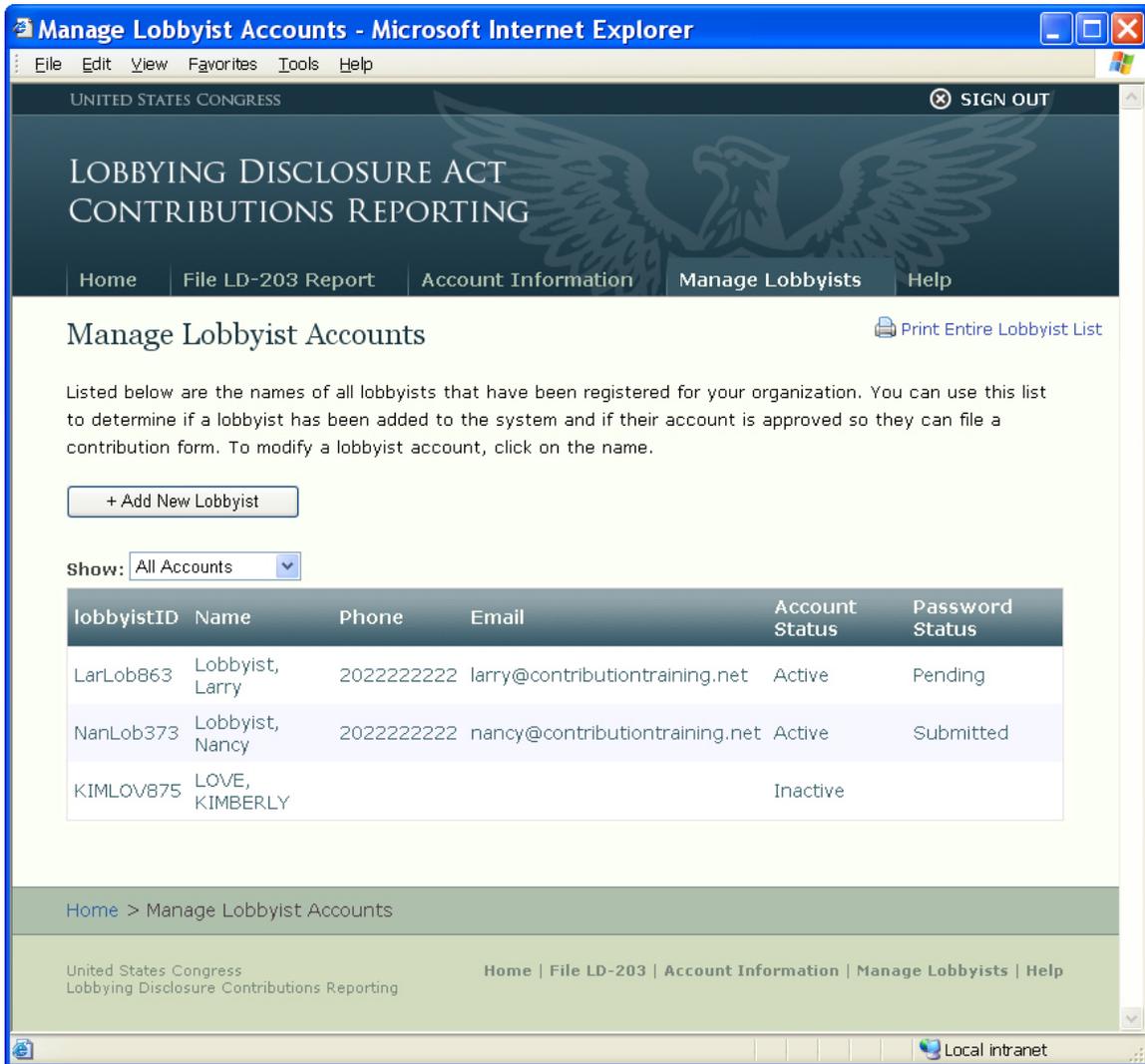
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## Correcting Email Addresses

If you have entered the email address for a lobbyist account incorrectly, it must be reset so that the activation email is sent to correct email address.

To reset the password:

- Click on the **Manage Lobbyists** tab in the header:



The screenshot shows a web browser window titled "Manage Lobbyist Accounts - Microsoft Internet Explorer". The page header includes "UNITED STATES CONGRESS" and a "SIGN OUT" button. The main navigation bar contains "Home", "File LD-203 Report", "Account Information", "Manage Lobbyists", and "Help". The "Manage Lobbyists" tab is selected.

The main content area is titled "Manage Lobbyist Accounts" and includes a "Print Entire Lobbyist List" link. Below this is a text block explaining that the list shows registered lobbyists and their account statuses, with instructions to click on names to modify accounts.

A "+ Add New Lobbyist" button is located below the text. A "Show:" dropdown menu is set to "All Accounts".

LobbyistID	Name	Phone	Email	Account Status	Password Status
LarLob863	Lobbyist, Larry	2022222222	larry@contributiontraining.net	Active	Pending
NanLob373	Lobbyist, Nancy	2022222222	nancy@contributiontraining.net	Active	Submitted
KIMLOV875	LOVE, KIMBERLY			Inactive	

The footer contains "Home > Manage Lobbyist Accounts", "United States Congress Lobbying Disclosure Contributions Reporting", and a secondary navigation bar with "Home | File LD-203 | Account Information | Manage Lobbyists | Help". The browser status bar shows "Local intranet".

The **Manage Lobbyist** screen is displayed:

- Click on the lobbyist account that you want to modify:

**Contact Information:**

International Number  

\*Phone Number:

\*Email Address:

\*Confirm Email:

This email address will be used to notify the lobbyist their account has been activated, and any subsequent communications regarding their account status.

**Account Status**

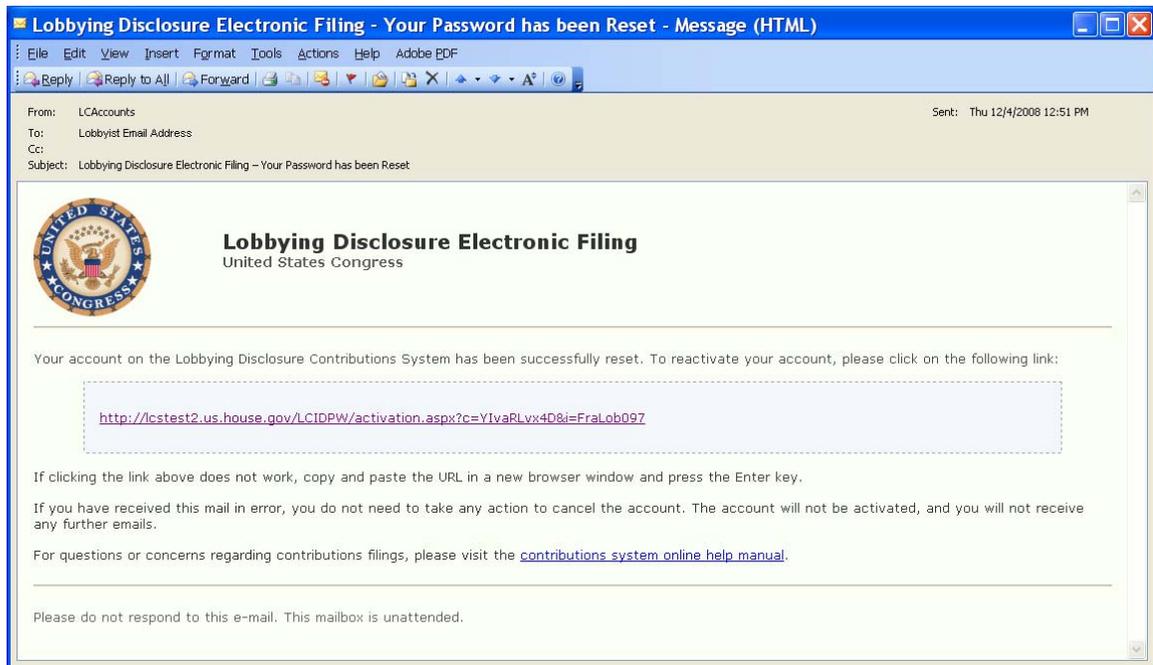
\*Select:  Active  Inactive

\*Effective Date:

You must file an updated LD1 or LD2 form that corresponds with this registration change before the lobbyist account status will be updated.

The **Edit Lobbyist** screen is displayed;

- Modify the email address and click the **Save** button;
- Contact the Legislative Resource Center and request that the password is reset for that account:



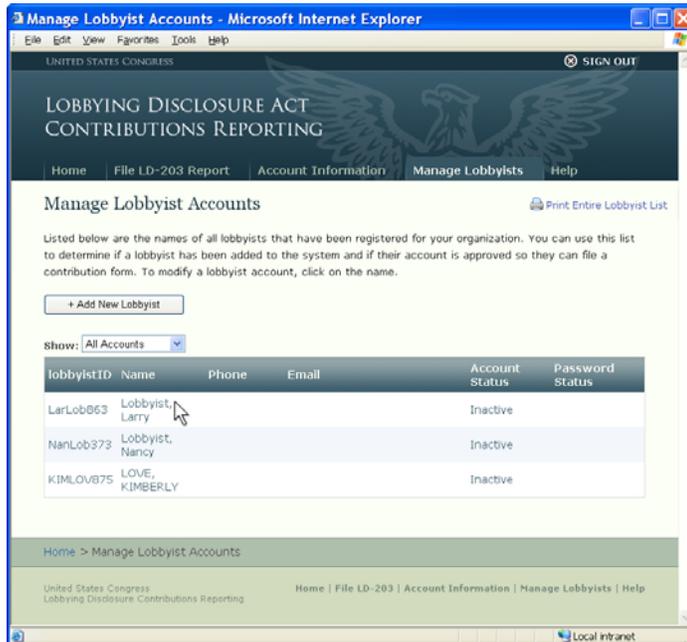
When the password is reset, the system will send a new activation email to the lobbyist so that the individual can reactivate their account.

## Verifying Previously Registered Lobbyists

To activate an account, you must verify the name and email address so the system can alert them via email that a password must be created for their account.

To verify the account of a previously registered lobbyist:

- Click on the **Manage Lobbyists** tab in the header:



The **Manage Lobbyist** screen is displayed;

- Click on the name of the lobbyist that you want to verify:

The **Edit Lobbyist** screen is displayed;

- Modify the name as needed, including adding a prefix and middle name to uniquely identify the individual;

**Contact Information:**

International Number

\*Phone Number:

\*Email Address:

\*Confirm Email:

This email address will be used to notify the lobbyist their account has been activated, and any subsequent communications regarding their account status.

---

**Account Status**

\*Select:  Active  Inactive

\*Effective Date:

You must file an updated LD1 or LD2 form that corresponds with this registration change before the lobbyist account status will be updated.

- Enter a phone number and email address in the appropriate fields;

*Note: It is critical that the email address is entered correctly as it is used for all system correspondence with the lobbyist. If the email address is not entered correctly, the account cannot be activated;*

- Select Active in the **Account Status** section, and click the **Save** button.



The **Manage Lobbyists** screen is displayed with a message that the account has been updated. The Account and Password status have also been updated to reflect that the account is now active but the lobbyist has not yet activated their account. When the password is set, the password status will be changed to active.

---

See [Reviewing Lobbyist Accounts](#) for a list of status definitions

---

## ***Activating Lobbyist Accounts***

---

Lobbyist accounts are unique to each actively registered lobbyist. You will continue to use the same ID and password as long as you are actively lobbying, even if you change your employer. Before you can log in you must activate your account and create a password.

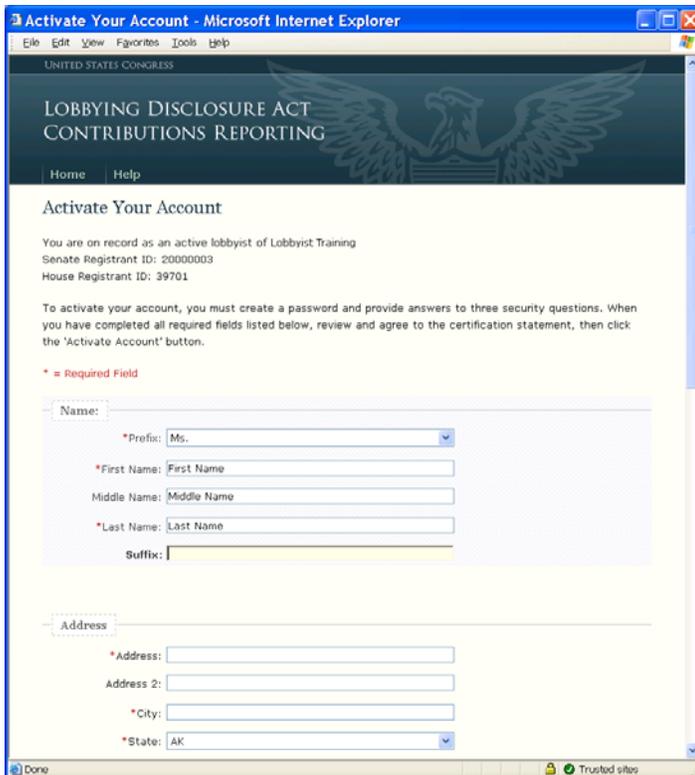
When your account is verified by your employer, the system will automatically send you an activation email so that you can create your password and set three security questions. The system will also send you an activation email if you have locked your account and need to reset the password.

To activate your account or reset your password:

- Locate your activate email:



- Click on the link in the body of the email or follow the instructions to copy and paste the email into a browser window:



An activation page is displayed;

- Modify the name fields as needed and complete the required fields for a mailing address;

- Update the phone number if needed;
- Type a password in the **Password** field and enter it a second time in the **Confirm Password** field;

*Note: Passwords are case sensitive and must contain at least 6 characters, at least one number, and at least one upper case character;*

- Select a question from the **Question 1** pull down menu in the **Security Question** section and type an answer in the **Answer 1** field;
- Repeat the previous step for security question 2 and security question 3;
- Click the **Activate Account** button;

## Thank You

Your account has been successfully submitted for activation. You will receive a confirmation email when your account has been approved by the Legislative Resource Center.

A confirmation will be displayed in your browser;

From: **Contribution Accounts** <[LCAccounts@mail.house.gov](mailto:LCAccounts@mail.house.gov)>  
Date: 17 Jun 2008 21:43:32 -0400  
Subject: Lobbying Disclosure Electronic Filing - Your Account has been Activated  
To: [lttest.twenty@gmail.com](mailto:lttest.twenty@gmail.com)



## Lobbying Disclosure Electronic Filing

United States Congress

### Account Status: Activated

The request submitted by your employer to create an account for **Lobbyist Name** on the Contribution System has been approved. Your account information is listed below:

ID: aaaa41522  
Password: 20Grinch

You will use this ID and password to logon to the system and file your contribution forms, required by each actively registered lobbyist under the Lobbying Disclosure Act. Please retain this information for your records.

<https://ld.congress.gov:4433/LC/home.aspx>

Please do not respond to this e-mail. This mailbox is unattended.

When your account has been activated a second email will be sent to you confirming your ID and password. Please save this email for your records and delete the original activation email. Once your account has been activated the link to activate the account is no longer valid and cannot be used again.

# Updating Account Information

Accounts on the contribution system are unique to each registrant and lobbyist and is used to provide access to the contribution form as well as to maintain some of the information that is used to pre-populate the form. The Account Information page on the Contribution Reporting System provides a way for each user to update information related to their account:

- Update the contact information that is pre-populated on the form for registrants and lobbyists;
- Change the lobbyist password;
- Modify the security questions and answers so lobbyists can retrieve the password automatically;
- Notify the House and Senate that a lobbyist is changing employers.

---

See [Tutorials](#) for registrant and lobbyist account management demonstrations

---

## Updating Registrant Contact Information

---

To update the contact information for an account:

- Click on the **Account Information** tab in the header:



The **Account Information** screen is displayed;

- Click on the link **Update Your Contact Information** in the Manage Your Profile section;

### Update Your Contact Information

Use the form below to identify the person in your organization that manages Lobbying Disclosure Registration and Reporting filings.

\* = Required Field

Contact:

\*Prefix: Ms.

\*Name: LD Registration Coordinator

International Number

\*Phone Number: 2022222222

\*Email Address: filer@systemtraining.com

\*Confirm Email: filer@systemtraining.com

*Note: The name that is entered for the contact is the name that is used to sign the form;*

- Modify the information displayed as appropriate;

\*Email Address: email.address@any.com

 The email addresses do not match

\*Confirm Email: email.address@any.com

If any of the fields are not complete or have an invalid entry, the system will display a message when your cursor leaves that field. When you have corrected the entry, the message disappears;

- Click the **Save** button when your changes are complete;

Home | File LD-203 Report | Account Information | Manage

Contact Information Successfully Updated

Welcome Contribution System Training

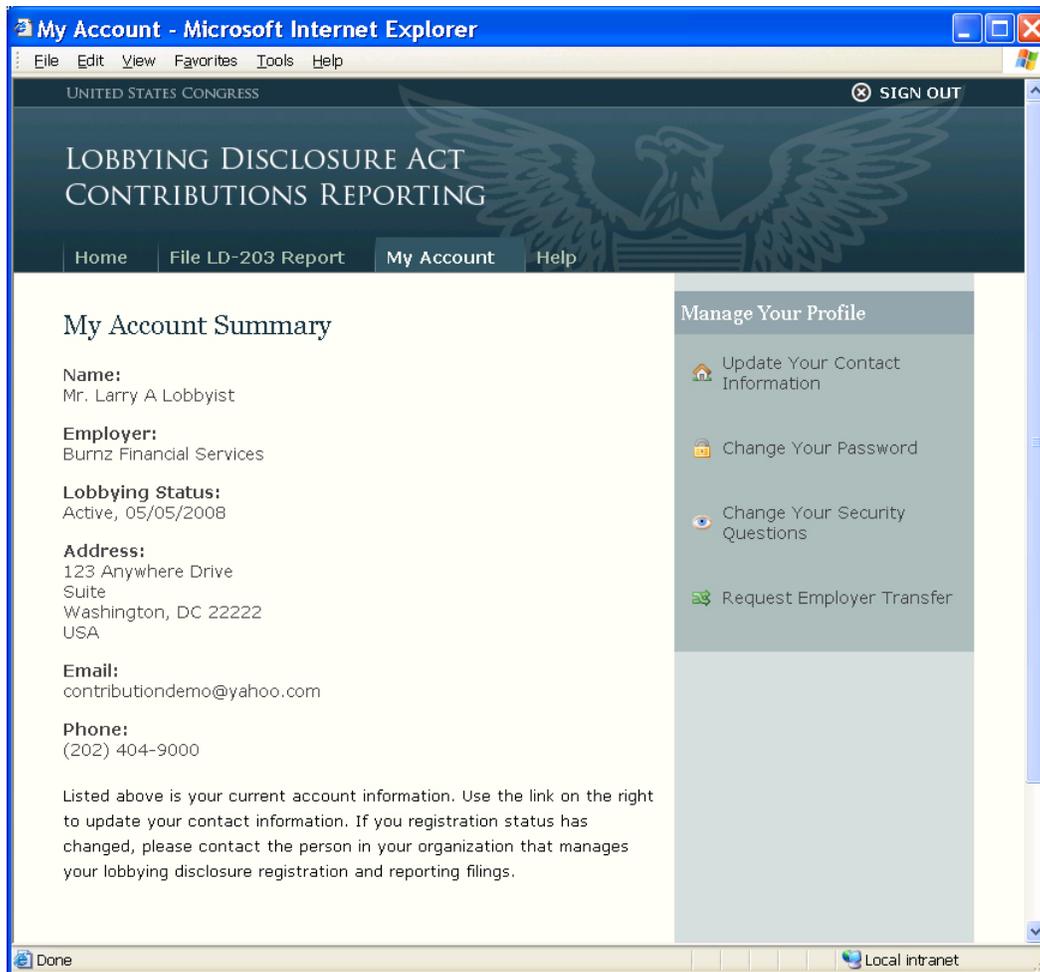
You will be returned to the profile page and a message will be displayed at the top of the page that your update was successful.

## ***Updating Lobbyist Account Information***

Lobbyists have the ability to update their contact information, change their password and security questions, or notify the House and Senate that they are changing employers using the **My Account** screen.

To update the contact information for an account:

- Click on the **My Account** tab in the header:



The **Account Information** screen is displayed with links to modify your account information.

## Updating Lobbyist Contact Information

To update the contact information for an account:

- Click on the link Update Your Contact Information in the Manage Your Profile section;

Name:

\*Prefix: Mr.

\*First Name: Larry

Middle Name: A

\*Last Name: Lobbyist

Suffix:

Address:

\*Address: 123 Anywhere Street

Address 2:

\*City: Washington

\*State: DC

\*Zip Code: 22222

\*Country: USA - USA

Contact Information:

\*Phone Number: 2022222222

\*Email Address: ltest.twenty@gmail.com

\*Confirm Email: ltest.twenty@gmail.com

Save Cancel

The **Update Your Contact Information** screen is displayed;

- Modify the information displayed as appropriate;

\*Email Address: email.address@any.com

The email addresses do not match

\*Confirm Email: email.address@any.com

If any of the fields are not complete or have an invalid entry, the system will display a message when your cursor leaves that field. When you have corrected the entry, the message disappears;

- Click the **Save** button when your changes are complete;

Home My ED-206 Report My Account Help

Contact Information Successfully Updated

My Account Summary

You will be returned to the profile page and a message will be displayed at the top of the page that your update was successful.

## Updating Passwords

Registrants do not have the ability to change their password, as it is maintained by the Senate. Lobbyists may change their password at any time.

To change a lobbyist password:

- Click on the link [Change Your Password](#) in the [Manage Your Profile](#) section;



The screenshot shows a web form titled "Change Your Password". Below the title, there is a password requirement notice: "Your password must be at least six characters long, contain at least one number, and one uppercase letter." A legend indicates that an asterisk (\*) denotes a required field. The form contains three input fields: "\*Current Password:", "\*New Password:", and "\*Confirm Password:". At the bottom of the form are two buttons: "Save" and "Cancel".

The **Change Your Password** screen is displayed;

- Enter your current password and the new password you want to use;
- Enter the new password again and click the **Save** button:



The screenshot shows a message box at the top of the page that reads "Password Successfully Updated". Below the message box, the heading "My Account Summary" is visible, followed by the word "Name:".

The **Account Summary** page is displayed with a message that your password has been updated successfully.

## Updating Security Questions

Security questions are used by lobbyists to locate their password if they forget it. Lobbyists may change the questions and answers for this feature at any time.

To change a lobbyist password:

- Click on the link [Change Your Security Questions](#) in the [Manage Your Profile](#) section;

**Update Your Security Questions**

You can change a security question, or the answer to a question you've already selected, by modifying any of the fields listed below. Click the 'Save' button when you are finished.

\* = Required Field

**Password Information**

\*Question 1: What is the make and model of your first car?

\*Answer 1:

\*Question 2: What is your father's middle name?

\*Answer 2:

\*Question 3: What is your mother's middle name?

\*Answer 3:

The **Update Your Security Questions** screen is displayed;

- Select new questions from the pull down list for any of the three questions;
- Enter new answers for any of the three questions and click the **Save** button:

Security Questions Successfully Updated

**My Account Summary**

The **Account Summary** page is displayed with a message that your security questions have been updated successfully.

## Requesting Employer Transfers

Lobbyists may notify the House and Senate that they will be working for a new registrant at any time. The request will be reviewed by the Legislative Resource Center and approved when both the old and new employer have filed the appropriate forms to add and remove the name from their respective list of employed lobbyists.

Requesting a transfer will not affect the account status for a lobbyist. The lobbyist may continue to sign in to the system and file contribution forms even if the request is pending. When the request is approved by the Legislative Resource Center the name will appear on the list of lobbyists for the new employer and pre-populated information on the contribution form will be updated.

To request a transfer to a new employer:

- Click on the link Request Employer Transfer in the Manage Your Profile section:

**Request Employer Transfer**

To locate your new employer, enter the registrant name, or part of the name, and click the 'Search' button. A list of all active registrant names that match your search criteria will be displayed. Click on the name of the employer you are transferring to and a confirmation of both your current and new employers will be displayed.

**Your Current Employer:**  
Burnz Financial Services  
House ID: 39257  
Senate ID: 20000002

**Find Your New Employer**

Employer Name:

The **Request Employer Transfer** screen is displayed;

- Enter at least three characters of the new employer name in the **Employer Name** field and click the **Search** button:

**Find Your New Employer**

Employer Name:

Name	House ID	Senate ID
Contribution System Training	39457	317710
Contribution System Training	39503	20000003
Contribution System Training old	39468	320235

A list of all registrant names that match your search criteria will be displayed;

- Click on the name of the registrant that you will be transferring to:

**Request Employer Transfer**

*Transfer requests must be approved by the Legislative Resource Center. You will be notified of the transfer after the appropriate Lobbying Disclosure Reports have been filed that terminate your lobbying status with your old employer and register you as actively lobbying for your new employer.*

**Transfer Summary**  
Please review and confirm your employment transfer request:

<b>Current Employer</b>	<b>New Employer</b>
<b>Name:</b> Burnz Financial Services	<b>Name:</b> Contribution System Training
<b>House ID:</b> 39257	<b>House ID:</b> 39503
<b>Senate ID:</b> 20000002	<b>Senate ID:</b> 20000003
<b>Address:</b> address line 1 address two Rockville, MD 21021 USA	<b>Address:</b> 123 Anywhere Drive Suite 100 Washington, DC 20001 USA

[« Select a different employer](#)

The **Transfer Summary** screen is displayed with both your old and new employer information;

- Click the **Submit Transfer Request** button to complete the request;

*Note: If you did not select the correct registrant, you can click the [Select a different employer](#) link to select a new employer;*

**Request Employer Transfer**

**Thank You**

Your transfer request has been submitted to the Legislative Resource Center and it will be reviewed within the next five business days. You can still file your lobbying contributions report while this request is pending.

- [Return to My Account](#)
- [Return to the Home Page](#)

A confirmation message will be displayed. When your transfer has been reviewed by the Legislative Resource Center an email will be sent to the email address on file for the lobbyist account with the results of their review.

# Working with the Contribution Form

Each time you sign in to the system, you establish an editing session for the contribution form. While you are signed in, you will have the ability to create a new filing, open a saved filing and append it, or retrieve a previously filed form and amend it.

Form Features:

- You must be logged into the system to access the Contribution form;
- The system saves the form for each filing period and it can be retrieved and edited at any time. If you are amending a previously filed form, the system sets the form as an amendment automatically;
- The Senate, House, and Lobbyist IDs, as well as the contact information you entered for your account, will be pre-populated on the form;
- A wizard is available to help you enter your contributions. You can display your entries in groups of 5, 10, 15, 20, or 25 entries per page display. You can also navigate directly to any page if you have entered a large number of contributions,
- Required fields and form entries will be checked as you work with the form. If a field is invalid, you will be prompted to correct it before continuing;
- Registrants can populate data from a database using an import tool;
- A printable version of your form can be generated at any time while you work with the form;
- The signing and submission process has been combined into a single step based on the User ID and password you used to sign into the system;
- A printable confirmation message will be displayed each time you file your form.

*Note: The import tool is designed for populating large forms by IT professionals familiar with using XML files only. If you are not familiar with XML, it is recommended that you use the online form that is provided to create your filings.*

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See [Tutorials](#) for a demonstration of working with the form

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## ***Creating a New Form***

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The contribution form is interactive and the system will build a unique filing for each reporting period in three easy steps. A contribution wizard has also been created to assist you in entering your individual contributions for each report. Once a filing has been created, it will be saved on the system so that you can append it as many times as needed until the report is ready to be submitted.

---

See Line by Line Instructions for more information on what should be entered on a report

---

To create a new report:

- Click on the **File LD-203 Report** tab in the header bar;

The **LD-203 Contribution Report** form is displayed;

- Select a year and report type from the **Report Year** and **Filing Period** fields, then click the **Continue** button:

The **Create New Report** screen is displayed;

- Click the **Create New Report** button;

LD-203 Contribution Report — 2008 Year-End

1 Report Period & Name    2 List PACs    3 List Contributions    4 Certification & Signature

Report Period & Name

**Confirm Your Personal Information**

**Name:**  
Ms. Clare Lobbyist

**Employer:**  
Contribution System Training

**Address:**  
123 Anywhere Street  
Washington, DC 20222-2222  
USA - USA

**Email:**  
name07@systemtraining.com

**Phone:**  
(202) 222-2222

When you have confirmed the above information is correct, use the button below to continue to PACs. If this information is incorrect, please use the [Update Contact Information](#) page inside the [My Account](#) tab.

Continue to PACs

Registration information that is pre-populated on your form from your account information will be displayed;

*Note: Registrant names can only be updated by filing a registration or reporting form with the corrected name. Filer contact information can be updated from the My Account or Account Information tab;*

- Click the **Continue to PAC's** button;

LD-203 Contribution Report — 2008 Year-End

1 Report Period & Name    2 List PACs    3 List Contributions    4 Certification & Signature

List Political Action Committees

[Review & Print Your Report](#)

PAC Name:

Continue to Contributions

A form for the year and filing period you selected is created on the server and the **List PACs** screen is displayed. You can use this screen to list the name of each political action committee that you established or controlled during the selected filing period;

- If you do not have any political action committee names to report, click the **Continue to Contributions** button;
- If you do have a political action committee name to report:

- Enter it in the **PAC Name** field and click the **Add Pac** button:

The name will be displayed below the field. If you have more than one name to report, you can repeat these steps until all of the names have been listed;

- If you need to edit any of the PAC names you have entered:
  - Click the **Delete** button next to any name you want to remove from this list;
  - Click the **Edit** button next to the name you want to change:

The name becomes editable;

- Click the **Update** button when your changes are complete:

- When you have confirmed that the information is correct, click the **Continue to Contributions** button:

*Note: You should review all of the PAC names you have entered before continuing. Each name on the PAC list will be available as a contributor on the next screen and cannot be edited if you select it as a contributor;*

The **List Contributions** screen is displayed with a wizard to help you enter your contributions:

- If you did not have any contributions for the reporting period, click the **No Contributions to report** checkbox. At this point, you do not need to list any contributions and you can sign and file your report;
- If you do have contributions to report, you can enter them on the form using the wizard;

*Note: The No Contributions checkbox is hidden if you've added at least one contribution to the form. All contributions must be deleted to display it again;*

- To enter a contribution:
  - Select a **contribution type** from the pull down menu;

- Select a **contributor name** from the pull down menu;

A screenshot of a web form showing a dropdown menu for "Contributor Name". The menu is open, displaying four options: "Self", "Official Pac Name", "Second Pac Name", and "Third Pac Name". The "Self" option is currently selected and highlighted in blue.

- Select the date of the contribution using a calendar or by entering the date;

A screenshot of a web form showing a "Date:" field. A calendar pop-up is displayed, showing the month of June 2008. The calendar includes days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates from 1 to 31. The current date, "Today: June 19, 2008", is indicated at the bottom of the calendar.

A screenshot of a web form showing three input fields: "Amount:" with a dollar sign and a currency mask, "Payee Name:" with a text box and scroll arrows, and "Honoree Name:" with a text box and scroll arrows.

- Enter the contribution amount, payee name, honoree name, and click the **Add Contribution** button:

A screenshot of a web form showing the "Honoree Name:" field. Above the field, a red error message reads: "Please provide the honoree name." Below the field is a blue "Add Contribution" button.

If the contribution entry is not complete, a message will be displayed above the field;

- Correct the entry and click the **Add Contribution** button again;

The new contribution entry will be displayed below the wizard. You may repeat these steps as many times as needed to insert all of your contributions.

*Note: At this point it is important to remember that the system saves the form for you. If you need to enter contributions for a specific filing period over several days or months, you can sign in to the system again, retrieve the saved form and append the filing as needed until it is ready to be filed;*

- If you need to edit any of the contributions you have entered:
  - Click the **Delete** button next to the entry you want to remove;
  - Click the **Edit** button next to the contribution you want to change:

All of the fields for that contribution become editable;

- Modify the fields as needed and click the **Update** button to apply your changes;
- When all of the contributions are complete and you are ready to file your form, click the **Continue to Signature** button to file it.

## Using Saved Forms

Because the system saves the last version of your form for each filing period, you can edit a filing in multiple sessions until it is ready to be submitted or amend a previously filed form without recreating it.

To access a previously created report:

- Click on the **File LD-203 Report** tab in the header bar;
- Select a year and report type from the **Report Year** and **Filing Period** fields, then click the **Continue** button:

Report Period & Name

**Previous Report Found**

A previously started report was found for this reporting period.  
Would you like to load this report or restart with a new form? *if you restart with a new form it will replace the previously started report*

When the saved form has been located, a message will be displayed asking if you want to create a new report or load the saved report;

- Click the **Load the Existing Report** button if you want to access the saved version of your form;

*Note: You can delete all previously entered information by clicking the Start with a New Form button;*

- Review the registration information for your form, then click the **Continue to PAC's** button;
- Review the political action committee names on your form, modify them as needed, then click the **Continue to Contributions** button:

LD-203 Contribution Report — 2008 Year-End Amendment

Report Period & Name | List PACs | **List Contributions** | Certification & Signature

List Contributions

\*Contribution Type: FECA  
\*Contributor Name: Self  
\*Date:   
\*Amount:   
\*Payee Name:   
\*Honoree Name:

#	Type	Contributor	Date	Amount
# 1:	Meeting Expenses	Official Pac Name	11/11/2008	5,200.00
# 2:	FECA	Self	09/16/2008	500.00

A list of all previously entered contributions will be displayed. If you have already filed the selected report, the system will mark the form as an amendment automatically;

- Add new contributions and edit them as needed until the report is ready to be filed. When your form is complete, click the **Continue to Signature** button.

## ***Importing XML Data***

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You may import contribution data using an XML file that you've created from any source, such as a database or Excel spreadsheet. The import tool is designed for populating large forms by IT professionals familiar with using XML files and only available to registrants by default. Lobbyists with more than 100 contributions to report and have the technical experience to use XML can contact the Legislative Resource Center about using the import tool.

*Note: If you are a lobbyist, or a registrant, who is not familiar with XML, it is recommended that you use the Wizard available on the Contribution form.*

The following files are available in the zip file [ld203FormImport.zip](#) that will help you use a spreadsheet to create an import file for the contribution form:

- LD3Export.xls (Blank Excel spreadsheet with schema mapping);
- LD3ExportSAMPLE.xls (Excel spreadsheet with sample data);
- LD3ExportXMLSample.xml (sample import file)
- LDC.xsd (LD203 Schema).

*Note: The LD203Import file works with Microsoft Office 2003 or later.*

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See Line by Line Instructions for more information on what should be entered on a report

---

### **Using a Database to Create an XML Import File**

The LD-203 schema is included in the Form Import zip file. Please consult the IT professional in your organization about using this schema to create XML import files from your database.

### **Using Microsoft Excel to Create an XML Import File**

To create a spreadsheet:

- Save the **LDC.xsd** and **LD3Export.xls** files to a local or network drive;
- Open LD3Export.xls:
- Enter all PAC names to be referenced for contributions in Column A, titled **name**;

*Note: The PAC name should be entered only once regardless of the number of times it is referenced in contributions (columns C – H);*

Column B is blank by design and should contain no data.

- Enter each of your contributions in column C – H using the following criteria:

- Enter one of the following contribution types in column C, titled **type**:  
 FECA  
 Honorary Expenses  
 Meeting Expenses  
 Presidential Library Expenses  
 Presidential Inaugural Comm
- Enter Self or the appropriate PAC name in column D, titled **contributorName**. PAC names entered in column D must also be listed once in column A or the import tool will fail to validate it;

*Note: Contributor types and names are case sensitive. You must enter Self with a capital S, and all types and Pac names exactly as they are listed or the import will fail;*

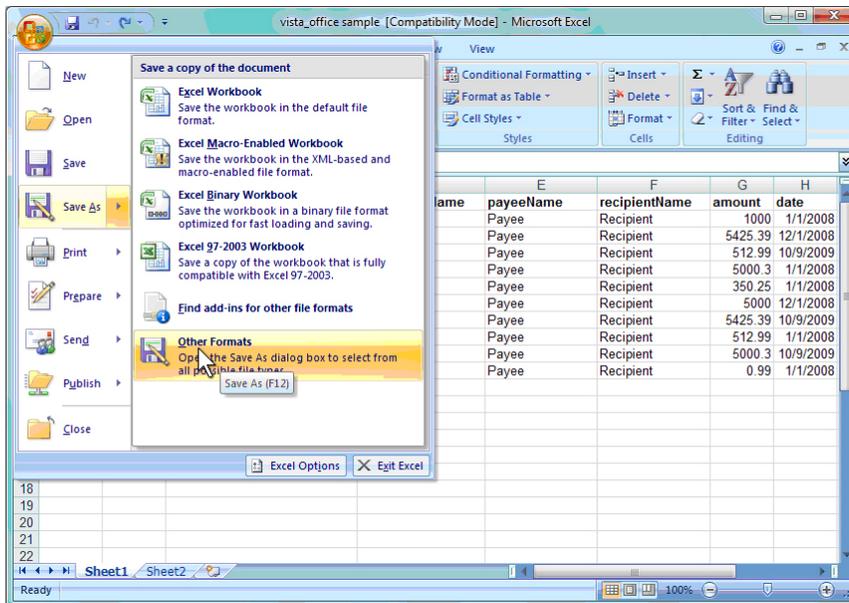
- Enter the appropriate Payee name(s) in column E, titled **payeeName**. Separate multiple Payees with a comma. (80 character limit);
- Enter the appropriate Honoree(s) in column F, titled **recipientName**. Separate multiple Honorees with a comma. (200 character limit);
- Enter the dollar amount for the contribution in column G, titled **amount**. **Do not enter a leading \$** You do not need to enter the decimal point for whole dollar amounts but you may do so to indicate cents;
- Enter the contribution date in MM/DD/YYYY format. (include slashes /) in column H, titled **date**;  
 Repeat these steps to enter each of your contributions.

To export the data in your spreadsheet as XML using MS Excel 2003:

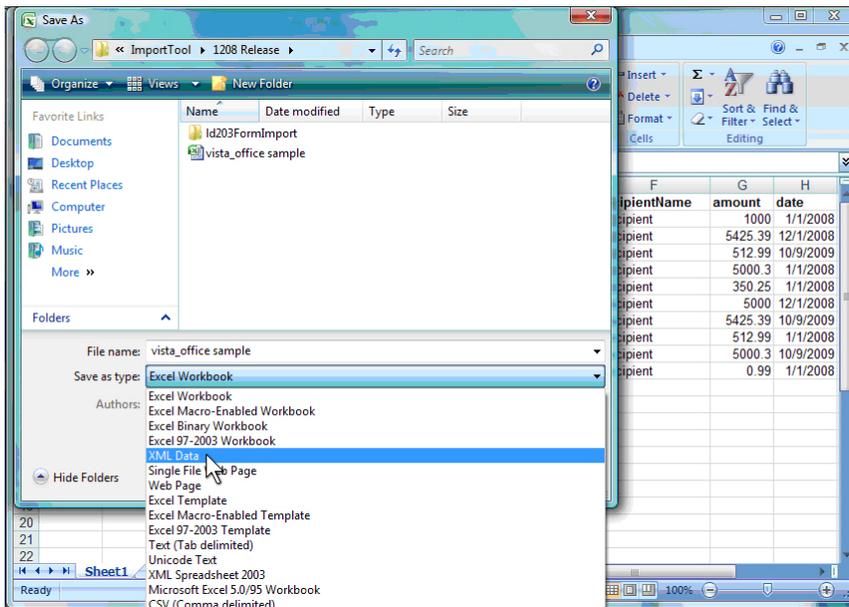
- Open your saved Microsoft Excel file completed in the above steps;
- On the toolbar, click on the **Data** menu;
- Click on **XML**, and select **Export**:  
 A “save as” window titled Export XML will appear.
- Navigate to the directory location of your choice (remember where you put it, you’ll need this xml file for use with the import tool);
- Enter a file name and click **Export**:  
 The XML file has been exported to the directory selected. The spreadsheet remains intact and should be closed and saved after the export.

To export the data in your spreadsheet as XML using MS Excel 2007 and Vista:

- Open your saved Microsoft Excel file completed in the above steps;
- Select **Save As** from the Office button;



- Click on **Other Formats**:



- Navigate to the directory location of your choice (remember where you put it, you'll need this xml file for use with the import tool);
- Click on **XML Data** in the **Save as type** field and enter a file name;

*Note: You must select XML Data as the type. If you select any other file type the import on the Contribution Form will fail.*

- Click the **Save** button.

The XML file has been exported to the directory selected. The spreadsheet remains intact and should be closed and saved after the export.

#### Data Entry Tips:

- In column A, a tab after each entry will move the cursor to the next row in column A. Column A and columns C – H are not linked in the spreadsheet;
- In columns C – H tabbing moves the cursor along the row. In column H a tab puts the cursor in the next row, column C;
- The columns may be re-sized as necessary;
- The spreadsheet may be saved at any point and re-opened for further data entry.

## Importing XML files into a New Contribution Form

To import the XML file into the contribution form:

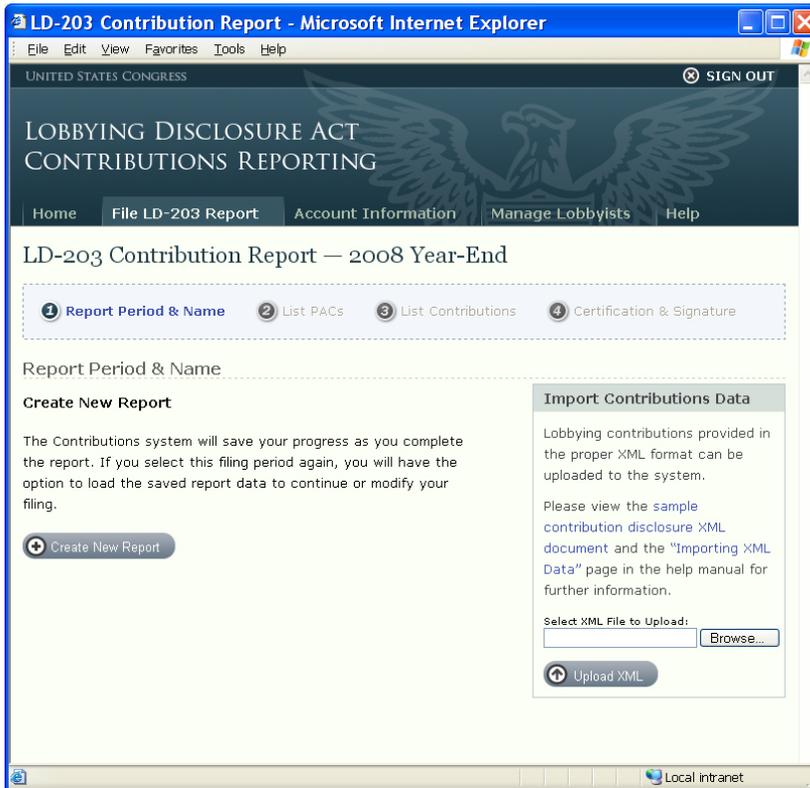
- Sign in to the system and click on the **File LD-203 Report** tab in the header bar;



The screenshot shows a web browser window titled "LD-203 Contribution Report - Microsoft Internet Explorer". The page header includes "UNITED STATES CONGRESS" and a "SIGN OUT" link. The main heading is "LOBBYING DISCLOSURE ACT CONTRIBUTIONS REPORTING". Below this is a navigation bar with tabs: "Home", "File LD-203 Report" (which is selected), "Account Information", "Manage Lobbyists", and "Help". The main content area is titled "LD-203 Contribution Report" and features a progress indicator with four steps: 1. Report Period & Name (active), 2. List PACs, 3. List Contributions, and 4. Certification & Signature. Under the "Report Period & Name" section, there is a "Report Year:" dropdown menu set to "2008". Below this are two radio button options: "Mid-Year (Jan. 1-Jun. 30)" and "Year-End (Jul. 1-Dec. 31)", with the "Year-End" option selected. A "Continue" button with a right-pointing arrow is visible at the bottom of the form. The browser's address bar shows "Home > File LD-203 Report" and the status bar at the bottom indicates "Local intranet".

The **LD-203 Contribution Report** form is displayed;

- Select a year and report type from the **Report Year** and **Filing Period** fields, then click the **Continue** button:



The **Create New Report** screen is displayed;

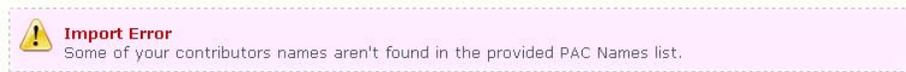
- Click the **Browse** button in the **Import Contributions Data** section:



The **Choose File** screen is displayed. Navigate to the folder where you stored the XML file you want to import;

- Select the file you want to import and click the **Open** button;

- Click the **Upload XML** button. The XML file you are uploading will be validated;



- If any entry in your import file does not pass validation, an error message will be displayed. You must correct the data in your import file and upload it again;



- If the import passes validation a successful message will be displayed. Click the **Continue** button to review the rest of your form;

*Note: This information cannot be changed on the contribution form. Registrant names can only be updated by filing a registration or reporting form with the corrected name. Filer contact information must be updated from the My Account or Account Information tab;*

- Click the **Continue to PAC's** button and verify that all of your PAC names are listed;
- Click the **Continue to Contributions** button and verify all of your contributions are listed;
- When all of the contributions are complete and you are ready to file your form, click the **Continue to Signature** button to file it.

*Note: You may edit your PAC name and contribution entries on the form if needed using the edit button for each entry.*

## Appending a Contribution Form with an XML File

You can use the import tool to append or replace an existing form. The system will determine if your filing is a new report or an amendment dynamically based on whether you previously filed an original report for the reporting period you select.

To append an existing Contribution Form using an XML import file:

- Sign in to the system and click on the **File LD-203 Report** tab in the header bar;



The **LD-203 Contribution Report** form is displayed;

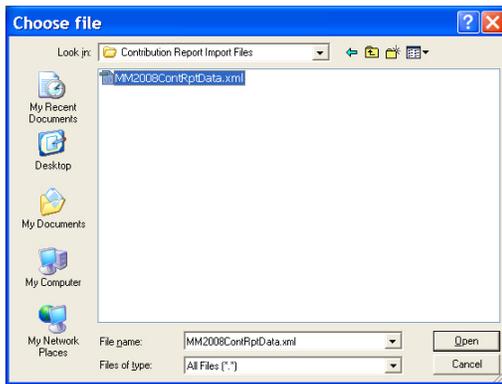
- Select a year and report type from the **Report Year** and **Filing Period** fields, then click the **Continue** button:



The **Previous Report Found** screen is displayed;

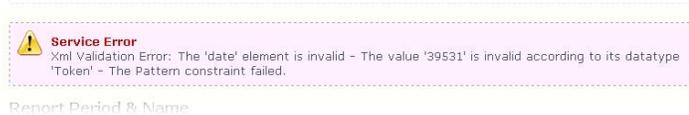
- Click the **Add to Existing Report** button if you want to insert additional data into your form;
- Click the **Replace Existing Report** button if you want to create a whole new report;

- Click the **Browse** button in the **Import Contributions Data** section:



The **Choose File** screen is displayed. Navigate to the folder where you stored the XML file you want to import;

- Select the file you want to import and click the **Open** button;
- Click the **Upload XML** button. The XML file you are uploading will be validated;



- If any entry in your import file does not pass validation, an error message will be displayed. You must correct the data in your import file and upload it again;



- If the import passes validation a successful message will be displayed. Click the **Continue** button to review the rest of your form;

*Note: This information cannot be changed on the contribution form. Registrant names can only be updated by filing a registration or reporting form with the corrected name. Filer contact information must be updated from the My Account or Account Information tab;*

- Click the **Continue to PAC's** button and verify that all of your PAC names are listed;
- Click the **Continue to Contributions** button and verify all of your contributions are listed;
- When all of the contributions are complete and you are ready to file your form, click the **Continue to Signature** button to file it.

*Note: You may edit your PAC name and contribution entries on the form if needed using the edit button for each entry.*

## Filing Your Form

When all of the entries on your form have been completed, you can certify you understand the gift and travel rules for the House and Senate and file it electronically.

To electronically file your completed form:

- If your form is not already open, complete steps 1 – 3 to create and complete the form;
- Click the **Continue to Signature** button on step 3:



- If you have additional comments you would like to add, enter them in the **Comments** field:



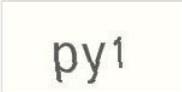
- Check the **Certification** checkbox that you understand the Standing Rules of the Senate and the Rules of the House on Gifts and Travel:



A message will be displayed when you try to file the form if the certification box is not checked;

*Note: Only the registrant or lobbyist listed on the form can check the certification portion of the form and file it;*

Type the Characters from the Picture Below



 Listen to the Characters

Type Characters:

 [Sign and Submit](#)

- Enter the characters displayed in the text box and click the **Sign and Submit** button:



United States Congress  
Lobby Disclosure Electronic Filing

**Filing Status: Submitted**

This message only acknowledges the receipt of your document. In no way is it intended to serve as an evaluation of that filing or as a guarantee that you are compliant with your filing requirements.

Your lobbying disclosure has been received and the reference number is listed below:

**Reference Number:** 700061165

**Received:** 12/4/2008 10:45:37 PM

**Filer Name:** Ms. Clare Lobbyist

**Report Year:** 2008

**Report Type:** Year End

Your submitted form will be processed, and you will receive a status message about your filing on behalf of both the House and Senate from the Congressional system.

 [Print Your Completed Report](#)

 [Print this receipt for your records.](#)

The form will be signed using the contact information for your account and submitted. When the form has been received, a confirmation message will be displayed. This confirmation will contain a reference number, your name, and the report year and type that you submitted;

- If you wish to keep a printed copy of your filing confirmation, click the **Print this receipt for your records** link;

- If you wish to print a copy of the filing for your records, click the **Print Your Completed Report** link:



# LOBBYING CONTRIBUTION REPORT

Clerk of the House of Representatives • Legislative Resource Center • B-106 Cannon Building • Washington, DC 20515  
 Secretary of the Senate • Office of Public Records • 232 Hart Building • Washington, DC 20510

## 1. FILER TYPE AND NAME

**Type:**  
 Organization  Lobbyist  
**Lobbyist Name:**  
 Ms. Clare Lobbyist  
**Employer Name:**  
 Contribution System Training

## 2. IDENTIFICATION NUMBERS

**House Registrant ID:**  
 40319  
**Senate Registrant ID:**  
 70002000  
**Lobbyist ID:**  
 clalob799

## 3. REPORTING PERIOD

**Year:**  
 2008  
 Mid-Year (January 1 - June 30)  
 Year-End (July 1 - December 31)  
 Amendment

## 4. CONTACT INFORMATION

**Address:**  
 123 Anywhere Street  
 Washington, DC 20222-2222  
 USA

## 5. POLITICAL ACTION COMMITTEE NAMES

- Official Pac Name
- Second Pac Name
- Third Pac Name

## 6. CONTRIBUTIONS

No Contributions

### #1.

<b>Contribution Type:</b> Meeting Expenses	<b>Contributor Name:</b> Official Pac Name	<b>Amount:</b> 5,200.00	<b>Date:</b> 11/11/2008
<b>Payee:</b> Meeting Hall	<b>Honoree:</b> Member Name		

### #2.

<b>Contribution Type:</b> FECA	<b>Contributor Name:</b> Self	<b>Amount:</b> 500.00	<b>Date:</b> 09/16/2008
<b>Payee:</b> Payee Name	<b>Honoree:</b> Member Name		

### #3.

<b>Contribution Type:</b> FECA	<b>Contributor Name:</b> Official Pac Name	<b>Amount:</b> 1,000.00	<b>Date:</b> 08/18/2008
<b>Payee:</b> Payee Name	<b>Honoree:</b> Member Name		

## 7. COMMENTS

Enter additional comments here

## 8. CERTIFICATION AND SIGNATURE

I certify that I have read and am familiar with the provisions of the Standing Rules of the Senate and the Standing rules of the House of Representatives relating to the provision of gifts and travel. I have not provided, requested or directed a gift, including travel, to a Member of Congress or an officer or employee of either House of Congress with knowledge that receipt of the gift would violate rule XXXV of the Standing Rules of the Senate or rule XXV of the Rules of the House of Representatives during this filing period.

**Digitally Signed By:**  
 Clare Lobbyist, 12/4/2008 10:45:37 PM

A printable version of your filed form is displayed in your browser. Use the print function in your browser to print the filed report for your records.

*Note: The system uses the individual listed under contact information to sign registrant forms, lobbyist forms will be signed using the lobbyist name.*

# Tutorials

The online tutorials listed below are designed to play in most standard browsers using the following applications:

- Windows media player version 9 or greater;
- QuickTime version 7 or greater;
- Flash version 9 or greater;
- Real Media Player version 10 or greater;

Please click the appropriate links below to view a training topic for the Contribution Reporting System.

<b>Topic</b>	 <b>Windows Media</b>	 <b>Apple QuickTime</b>	 <b>Real Media</b>
Introduction by the Clerk & Secretary	<a href="#">Introduction.asx</a>	<a href="#">Introduction.mov</a>	<a href="#">Introduction.ram</a>
Understanding Electronic Filing	<a href="#">Overview.asx</a>	<a href="#">Overview.mov</a>	<a href="#">Overview.ram</a>
Registrant Training	<a href="#">Registrant.asx</a>	<a href="#">Registrant.mov</a>	<a href="#">Registrant.ram</a>
Lobbyist Training	<a href="#">Lobbyist.asx</a>	<a href="#">Lobbyist.mov</a>	<a href="#">Lobbyist.ram</a>
Working with the Contribution Form	<a href="#">Forms.asx</a>	<a href="#">Forms.mov</a>	<a href="#">Forms.ram</a>
Where to Get Help	<a href="#">Help.asx</a>	<a href="#">Help.mov</a>	<a href="#">Help.ram</a>



# Appendix

## *Line by line Instructions*

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You must be logged into the system to access the form and file it.

**STEP 1. REPORT PERIOD & NAME:** You must select the report year and period to create or append a report. If you are amending a previously filed report, the system will check the amendment box for you automatically.

Click “Continue” to review the registration information that will be pre-populated on your form.

**STEP 2. LIST PACS:** After you have reviewed your registration information, you can enter the name of each political action committee (“PAC”) that you established or controlled. Enter the PAC name in the text box and click “Add PAC.” You may add up to ten PACs. If you may also skip this screen if do not have any PACs to report.

Click “Continue to Contributions” when you are finished with the PAC listing for your filing.

**STEP 3. LIST CONTRIBUTIONS:** If you do not have any contributions to report, click on the “No Contributions to Report” box,

If you do have contributions to report, use the Contribution wizard to insert each contribution you need to report:

- Select FECA, Honorary Expenses, Meeting Expenses, Presidential Library Expenses, or Presidential Inaugural Committee from the drop down list:

*Note: FECA contributions are campaign contributions to federal officeholders, leadership PACs and political party committees. Honorary Expenses is an expansive category designed to capture many required disclosures, such as the cost of an honoring event, a payment to an entity named for or in recognition of a covered legislative official, to an entity established, financed, maintained or controlled by a covered official, and contribution to a presidential inaugural committee;*

- Select the contributor (self or PAC(s)) from the drop down list;
- Select the date of the contribution using the calendar tool or typing the date in mm/dd/yyyy format;
- Enter the amount of the contribution;
- Enter the payee name. Payee names may be the campaign committee name for the covered official (such as “Citizens for Senator X”), or the vendor (such as “AnyState University,” or “Hotel Splendide”);
- Enter the honoree name. Honoree name is the Member of Congress (such as “Senator Theresa Terrific”) or “Representative Grant Goodguy”);
- Repeat these steps to enter each contribution.
- Click “Continue to Signature” to certify and file your form.

**STEP 4. CERTIFICATION:** Each registrant and lobbyist must check the box to certify that they have read and are familiar with the rules of the U.S. Senate and the U.S. House of Representatives relating to the provision of gifts and travel; and have not provided, requested, or directed a gift, including travel, to a Member, officer or employee of either body that would violate the rules of the body.

If you have additional comments on your report that you want to make to clarify an entry, please use the comments box.

Click "Review & Print Your Report" to view a printable version of your filing. When you are sure that you have included all of your contributions, click on the "Sign and Submit" to file your form with the Senate and the House. A filing confirmation will be displayed in your browser when your form has been submitted. A confirmation email will be sent to the email address on record for the filers account when your form has been processed.

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See [Understanding Electronic Filing](#) for more information on processing messages

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# Troubleshooting Guide

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

## *Accessing the System*

---

### **Website Issues**

Access to the system is provided using an ID and password. If the sign in screen does not display several factors may be causing the problem:

- The Contribution System requires the following configuration:

Internet Explorer Version 6.x SP2, or Firefox Version 2.x;

Java Version 1.5;

To resolve the problem you may need to update Java or your browser;

- The sign in screen is displayed by clicking on the **LD-203 Contribution** link on the Lobbying Disclosure website. If you have blocked pop-ups, the sign in screen may not display. Click here to access the system directly: <https://ld.congress.gov:4433/LC/>;
- Restricted web sites: Some users are restricted to accessing web sites that are listed as a trusted site only. Adding "LD.CONGRESS.GOV" to the list of trusted sites on your browser may allow you to access the web site;
- Network restrictions. If you receive any of the following messages you are being blocked by your network:

502 proxy error. The specified Secure Sockets Layer (SSL) port is not allowed. ISA Server is not configured to allow SSL requests from this port;

Access Denied;

Page Cannot Be Displayed;

HTTP:404 Page not found

Some registrants have firewall restrictions from within their network that do not allow users to access non-standard ports for a website. You will need to discuss this with your IT department for a solution. Please contact LRC to discuss the firewall configuration settings that need to be adjusted to allow access to the web site

## Sign In Issues

Registrants must use their Senate ID and password to sign into the system. Lobbyists must create a password and security questions before they can sign into the system. If you can't sign in, several options are available to assist you:

- If the sign in screen is displayed, but you can't sign in because of a wrong ID or password:
- If you are a lobbyist and the system says your ID or email address can't be found:  
Please contact the person in your organization that manages your registration and reporting process. You must be registered as a lobbyist and your employer must verify your account before you are sent an activation email.
- If the employer verified the lobbyist account, but the lobbyist did not receive an activation email:  
You must verify that the email address on the account is correct. You should also review the junk email settings to make sure that all mail from [LCAccounts@mail.house.gov](mailto:LCAccounts@mail.house.gov) can be received.

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See [Locating Your ID Number](#) or [Locating Your Password](#) to obtain the correct ID or password

---

## *Problems Receiving Email Messages*

---

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

- All system messages are sent to the email address on each account. Please check the email address and verify it is correct. If the lobbyist isn't able to sign in to the system, the registrant can update the email address for their employees from the "Manage Lobbyist" screen;
- Spam blockers may be rejecting the email, or filtering it to a junk mail folder. Add the domain name [lcaccounts@mail.house.gov](mailto:lcaccounts@mail.house.gov) and [lcefiling@mail.house.gov](mailto:lcefiling@mail.house.gov) to your address book or safe list and check the filers junk mail folder;
- Automated spam filters require a response from the sender before it will allow the email. These requests will not be responded to. You must contact your IT support staff if you need help in getting emails from [lcaccounts@mail.house.gov](mailto:lcaccounts@mail.house.gov) and [lcefiling@mail.house.gov](mailto:lcefiling@mail.house.gov) accepted automatically.

If a lobbyist inadvertently deleted, or did not receive, an activation email, please contact the House Legislative Resource Center at (202) 226-5200 about resending the activation email.

## ***Importing XML Data***

---

The import tool has been designed for use by IT professionals that are proficient with XML. If you are using the import spreadsheet there are several things that you must consider:

- If you have less than 100 contributions to report, it is better to use the online form. The spreadsheet requires redundant data entry that is not required if you use the form;
- If you are not proficient with XML, it may take you longer to troubleshoot import problems than it will take to enter the contributions on the form.

If you still wish to use the spreadsheet to create your import file, you may receive one of the following errors if you did not enter your contributions correctly:

<b>Service Error</b>	<b>Resolution</b>
Failed System Null Reference	The import tool will not accept XML files that were generated using MS Excel 2002 or earlier. If you do not have the XML functions on the Data menu and have to use the Save As feature to create the XML, you are not using the correct version of Excel. You must upgrade to MS Excel version 2003 or later and then export a new XML file.
Some of your contributor's names aren't found in the provided PAC Names list.	The import tool is case sensitive. This message indicates that you probably have a typo in one of the contributor fields in your spreadsheet. You must make sure that the PAC names listed are the same as the contributor name and export a new XML file.
This Import Contains empty PACS. Please adjust your XML file and try again.	The import tool will not accept files that have blank PAC elements. Check the spreadsheet and remove any blank PAC entries, then export a new XML file.

## ***Viewing Completed Forms***

---

Filers who are using Mozilla Firefox may experience problems viewing their completed form. If the printable version of the form is displayed in Firefox version 1, and has more than one page of reported contributions, the content may not be printable.

To correct the problem, upgrade to Firefox 2.0.0.15 or higher.

## ***Viewing the Training DVD on a Computer***

---

The training DVD that was mailed to each active registrant is designed to be viewed on a television using a DVD player. If you have a computer with a DVD drive you may view each training topic provided your computer has current drivers installed to view a DVD.

If you receive a message that your computer cannot display the video, please review any messages that may be displayed or consult your IT professional to update the drivers. Commonly reported problems playing the DVD on a computer are:

Real Player 11	Update the driver for Intervideo WinDVD 4.0 DXVA to install the latest codex drivers
Windows Media Player	Upgrade the player to version 11 to install the latest codex drivers

# Frequently Asked Questions

[Frequently Asked Questions](#) are available on the Lobbying Disclosure website.

# Printable User Manual

A printable version of this manual is available in PDF format for easy printing: [Contribution Reporting 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.





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